

UNITED STATES BANKRUPTCY COURT  
FOR THE  
NORTHERN DISTRICT OF WEST VIRGINIA



**ATTORNEY  
ELECTRONIC FILING  
MANUAL**

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2003

L. Edward Friend II, Judge  
Michael D. Sturm, Clerk

## FORWARD

We have spent a lot of time trying to put together an **ATTORNEY ELECTRONIC FILING MANUAL** which is the best in the country. The manual does *not* include every possible event (document or pleading) that you may file, although we have tried to include the most important or most frequently filed or most involved items in this publication. If you can successfully e-file the documents that are presented in this manual, you can successfully e-file anything.

Your success in using electronic document filing will depend totally upon your time and patience in learning this new way of interacting with a court. The most exciting aspect of this adventure is that you have the opportunity to become immediately involved in a practice that will be uniform in all courts in America - federal, state and local - within a few short years. You are one of the lawyers who asked to become certified as an electronic filer and we hope that you dedicate enough time to the task that you will quickly learn of the tremendous benefits to this form of submitting documents to the court.

Please allow me to belabor this point: **You must make whatever sacrifice that is necessary in terms of time and effort in order to reap the benefits of e-filing.** This is something entirely new to you and your office so it will take some learning before you become proficient. Your first e-filed document may take you the better part of a half day to complete. However, your second such filing may only take an hour. Then, as you really learn the system, you will be filing electronically and flawlessly in only minutes and without consulting your manual.

The training which we will provide you is principally to acquaint you with the manual, and the benefits and possibilities associated with e-filing. Your success as an e-filer is entirely up to you, although we will make every effort to assist you along the way.

If it becomes evident that e-filing is not beneficial to your practice, we may agree that returning to conventional filing is the best course of action for your operations.

Please allow me just a moment to express the sincere gratitude of myself and Judge Friend for all of the hard work of our tiny systems staff, Chris Warsinsky, Marcie Kacsmar, and Chris Daniel, for putting together this rather immense automated system for filing and maintaining court records.

I wish you the very best in this new endeavor.

Mike Sturm

**UNITED STATES BANKRUPTCY COURT  
FOR THE NORTHERN DISTRICT OF WEST VIRGINIA**

**Attorney Manual**

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*This section outlines the types of documents from which the attorney may select when electronically filing a pleading with the Court.*

## **Hardware and Software Requirements For Electronic Filing in CM/ECF**

Attorneys will need the following hardware and software to electronically file, view, and retrieve documents in the electronic filing system.

- A personal computer running a standard platform such as Windows, Windows 95, Windows 98, Windows XP , Windows NT Workstation 4.x, Microsoft Windows 2000 Professional or Macintosh.
- 256-MB of RAM
- Internet service and a compatible browser (Netscape Navigator 4.6 or 4.7 and IE 5.5 were the only browsers tested on CM/ECF. The CM/ECF technical staff is currently testing Netscape version 7.02 and Internet Explorer version 6.0 to certify its compatibility with the Bankruptcy and District CM/ECF systems. However, there are users currently accessing the system using Netscape version 7.02 and Internet Explorer version 6.0 with positive results. In either case, the browser must be JavaScript-enabled with cookies enabled.). (CM/ECF does not work with AOL.)
- Software to convert documents from a word processor format to portable document format (PDF). Adobe Acrobat PDF Writer, as well as certain word processing programs can perform this function. Both Acrobat Writer Version 3.X and 4.X meet the CM/ECF filing requirements. The CM/ECF technical staff is currently testing Version 5 to certify its compatibility with the CM/ECF system. For viewing documents, not authoring them, only Adobe Acrobat Reader is needed.
- A PDF-compatible word processor like Macintosh or Windows-based versions of WordPerfect and Word.
- A scanner to transmit documents that are not in your word processing system.

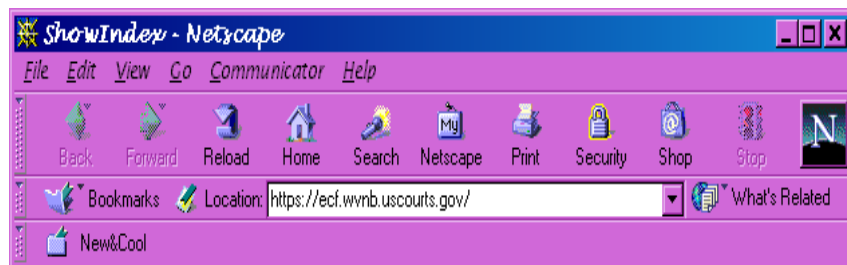
## Accessing CM/ECF

The CM/ECF system is a web based software program. At this time Netscape Navigator 4.7 (or earlier versions) and Internet Explorer 5.5 (web browsers) have been tested and recommended for use with this program. CM/ECF court users process cases through the federal courts' restricted intranet while attorneys and other public users will submit pleadings and view case data from the internet. Both court and external users have different levels of access to screens via menu selections and functionality as determined by their needs.

**STEP 1** To access the court web site, open Netscape Navigator or Internet Explorer and enter one of the following URL's:

For our Live Database: (<http://ecf.wvnb.uscourts.gov>) and  
For our Training Database:( <http://ecf-train.wvnb.uscourts.gov> )

in the browser's Location field. **(See Figure 1.)** Familiarity with browser navigation and functionality is recommended for successful and efficient use of this system.



**Figure 1**

**NOTE:** For quick access to this site in the future, set a bookmark or create a button on your navigation bar, **(See Figure1.)**

The Back button



on your Netscape navigation bar

can be used to back up in case processing or queries at any time. You will find that the Back button and the Forward button



will allow you added flexibility in case processing.

- STEP 2** The **CM/ECF CERTIFICATE NAME CHECK** screen may display next. You may see a series of security screens similar to this.



**Figure 2**

- ◆ Click **[Continue]** and read the security information until the **[Finish]** button appears.

- STEP 3** The Court **Welcome Screen** is shown in **figure 3**. Click on the hyperlink: "Northern District of West Virginia - Document Filing System" to enter the system.

**STEP 4 Logins and Passwords**

Internet users (attorneys, trustees and, in some courts, certain creditors) will use two sets of logins and passwords; one for CM/ECF filing and the other for Public Access to Electronic Records (PACER) access for queries and reports. Registered Internet users will see a login screen as pictured below. (See Figure 4)

**ECF/PACER Login****Notice**

This is a **Restricted Web Site** for Official Court Business only. Unauthorized entry is prohibited and subject to prosecution under Title 18 of the U.S. Code. All activities and access attempts are logged.

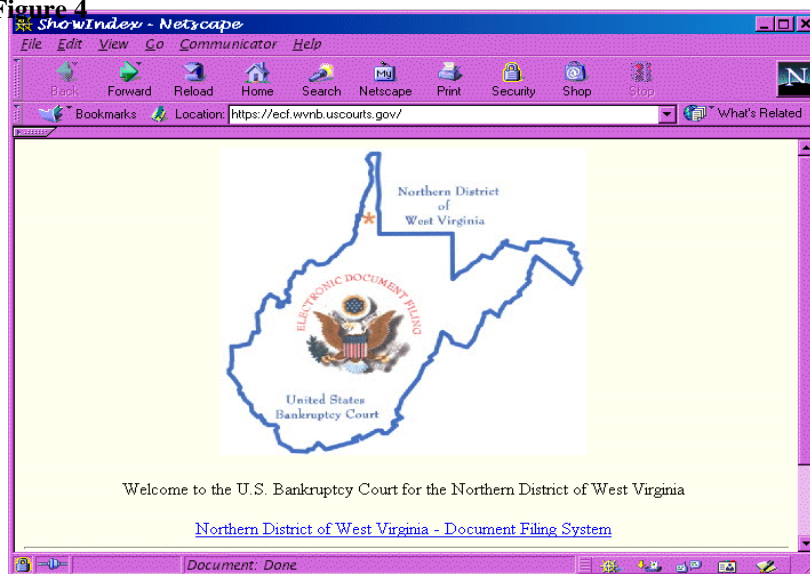
**Instructions**

Enter your ECF login and password for electronic filing capabilities. If you do not need filing capabilities, enter your PACER login and password. If you do not have a PACER login, contact the PACER Service Center to establish an account. You may register online at <http://pacer.psc.uscourts.gov> or call the PACER Service Center at (800) 676-6836 or (210) 301-6440.

An access fee of \$.07 per page, as approved by the Judicial Conference of the United States at its September 1993 session, will be assessed for access to this service. All inquiries will be charged to your PACER login that is kept on file. If you do not need filing capabilities, enter your PACER login and password. The Client code is provided to the PACER user as a means of tracking transactions by client. This code can be up to thirty two alphanumeric characters long.

<b>Authentication</b>	
Login:	<input type="text"/>
Password:	<input type="password"/>
client code:	<input type="text"/>
<input type="button" value="Login"/> <input type="button" value="Clear"/>	

CM/ECF has been tested and works correctly with Netscape 4.6x, Netscape 4.7x and Internet Explorer 5.5.

**Figure 4****Figure 3**

Participants will initially enter their CM/ECF login and password

which has been issued by the court on this screen. This login and password allows electronic filing of documents, not access to reports or queries.

The registered user's login and password is the electronic equivalent of their signature.

Your **Login** and **Password** fields are case sensitive. A login of thomask should not be entered as Thomask or THOMASK. The password cannot exceed 8 characters and should not include special characters (%,#,\$,%).

The **client code** field is optional and is used for PACER users to associate this activity to specific customers.

If an error is made entering login and password information before submitting the screen, clicking on the **[Clear]** button will delete the data and allow you to reenter information.

This login screen will subsequently appear when web users select any report or query selection from a CM/ECF menu.

PACER information and registration is available at <http://pacer.psc.uscourts.gov/>

All users are personally responsible for activity with their logins. Participants can also be given access to maintain their login and password, address and e-mail preferences.

The PACER site also offers free Internet access to a series of CM/ECF tutorials for attorneys and other web users through a series of Computer Based Training (CBT) modules. No login or password or charge is required for this feature. The lessons can be done at your PC in individual modules at the convenience of the student. Screens replicate the CM/ECF environment and are interactive.

Access to this resource is available at <http://www.pacer.psc.uscourts.gov/ecfcbt/>.

**STEP 5**      The **CM/ECF MAIN MENU** screen is pictured in **Figure 5**.

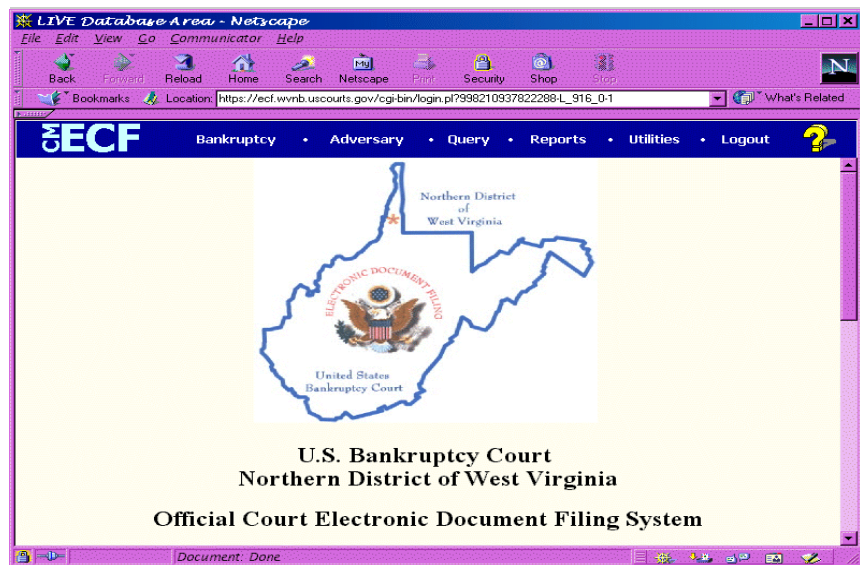


Figure 5

Access to the various modules are provided by the blue Main Menu Bar at the top of the screen. Each selection is a hyperlink to another set of options or hyperlinks allowing participants to file documents, query, view or print a docket sheet, generate reports or maintain the system.

This menu is also used to exit the system. The preferred method to exit CM/ECF is to click the **Logout** hypertext link on the CM/ECF Main Menu Bar.

## CM/ECF Maintain User Accounts

All CM/ECF users will be issued an account with a user login and password. The CM/ECF login provides registered users the ability to submit pleadings electronically to the court. Public users (attorneys, trustees, and creditors) must also log into PACER to inquire on cases or look at reports. Existing PACER logins and passwords will be accepted.

Non-court users can access their own account information through the Maintain Your ECF Account menu. Using this option, participants can update their name, mailing and E-mail addresses, phone and fax numbers, and password. Users can therefore control the accuracy of their own information in a timely manner.

This module explains how trustees can update:

- ◆ user name, address and other party data
- ◆ E-mail information
- ◆ electronic noticing preferences
- ◆ user login and passwords.

***This module will assume that the internet user has accessed the court's web site with their court assigned CM/ECF login and password.***

**STEP 1** After clicking on **Utilities** on the CM/ECF Main Menu bar, select Maintain Your ECF Account, which is found under the **Your Account** sub-menu. (See Figure 1.)

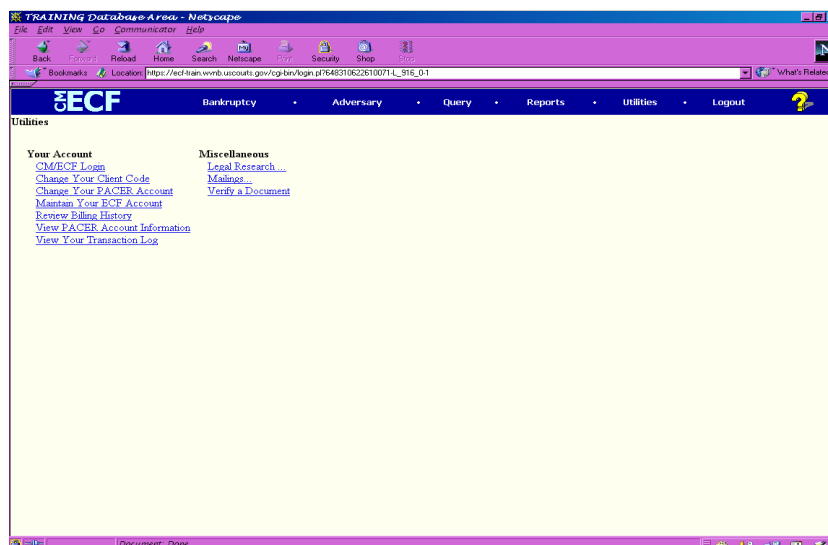


Figure 1

## STEP 2

Your user account screen will appear displaying your current account information. (See Figure 2.)

Figure 2

- ◆ Update your personal information on this screen. When it is correct, click **[Submit]** to save the changes. If the **[Submit]** button is not used, the record will not be modified.

- ◆ The **[Email information...]** and **[More user information]** buttons provide further screens to modify your user profile. The following pages will explain these features in more detail.

**STEP 3** The E-MAIL INFORMATION screen presents options for control of your electronic notification on each court's CM/ECF system. (See Figure 3.)

The screenshot shows the 'E-mail information for D.L. Wilson' screen. It includes a 'Primary e-mail address' field containing 'DLWilson@lawfirm.net'. Below this, there are checkboxes for 'Send the notices specified below': 'to my primary e-mail address' (checked) and 'to these additional addresses' (unchecked). There are also checkboxes for 'Send notices in cases in which I am involved' (checked) and 'Send notices in these additional cases' (unchecked). Underneath, there are radio buttons for 'Send a notice for each filing' (selected) and 'Send a Daily Summary Report' (unselected). The 'Format notices' section has radio buttons for 'html format for Netscape or ISP e-mail service' (selected) and 'text format for cc:Mail, GroupWise, other e-mail service' (unselected). At the bottom, there are two buttons: 'Return to Account screen' and 'Clear'.

**Figure 3**

You can request e-mail copies of notification on all cases to which you are a party or only on specific cases. You can receive e-mail activity throughout the day or a daily summary of all noticing activity. "All activity" includes notification of claims as well as other entries to a case.

Each e-mail will include the case number and name of the docket entry in the subject line of the mail message.

Each section on the E-MAIL INFORMATION screen is explained below:

- ◆ **Primary E-mail address.** This address must be formatted to Internet protocol or an error will be generated. It may be prudent to establish a separate E-mail account for CM/ECF activity from your routine E-mail correspondence.
- ◆ **Send the notices specified below...**
  - ☐ **to my primary E-mail address**

To activate CM/ECF notification you must first check the box next to your E-mail address.

- ☐ **to these additional addresses**  
You may have notices sent to other E-mail addresses besides your primary E-mail address. (Paralegals or chambers staff may want to share this notification activity.) When entering multiple E-mail addresses, separate each address with a semi-colon.
- ☐ **Send notices in cases in which I am involved**  
Checking this box will automatically inform the user when any filing has been submitted in a case where this person is a participant. Chapter 7 panel trustees and offices of the U.S. Trustee may find this advantageous for new filings as well as routine case activity.
- ☐ **Send notices to these additional cases**  
You do not have to be a participant in a case to receive notification of activity. Trustees and attorneys can elect to be notified of activity in cases in which they have an interest but are not parties to the case. Court and chambers staff can monitor cases through this process also. It is possible to select both options.

**NOTE:** This list is maintained by each user. As you are involved in more cases or as cases close, you must update this screen.

- ◆ **Send a notice for each filing.**  
Checking this box means you will receive E-mail notices when activity occurs throughout the day to the account(s) specified above. The title of the E-mail will describe the type of filing and the case number.
- ◆ **Send a Daily Summary Report**  
A comprehensive list of one day's activity can be sent once a day. Notifications for claims will also be included in this mail list. (See Figure 3a.)

Bruce Williams 11/26/2001 8511 Summary of ECF Activity			
<a href="#">99-11228-lmc Michael Holdman and Wendall Holdman</a> Notice of Appearance <a href="#">5</a> <a href="#">5-01-50021-lmc John Aadams and Mary Aadams</a> Proof of Claim Filed <a href="#">1</a> <a href="#">5-01-50021-lmc John Aadams and Mary Aadams</a> Proof of Claim Filed <a href="#">2</a>			

Figure 3a

A Summary report includes the case numbers and titles of cases in which activity occurred for that day. The text of the Summary E-mail notification will display the docket event and the document number (including the hyperlink).

**NOTE:** You cannot elect to receive both separate notices and the summary report.



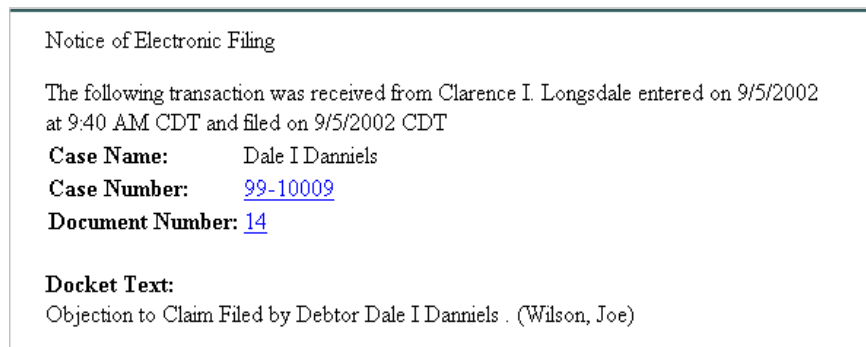
**Format notices**

Enter the E-mail delivery method. This selection will be determined by your E-mail type.



**html format for Netscape or ISP E-mail servicer**

The html format will include hyperlinks to the document or claim.  
**(See Figure 3b.)**



Notice of Electronic Filing

The following transaction was received from Clarence I. Longsdale entered on 9/5/2002 at 9:40 AM CDT and filed on 9/5/2002 CDT

**Case Name:** Dale I Danniels  
**Case Number:** [99-10009](#)  
**Document Number:** [14](#)

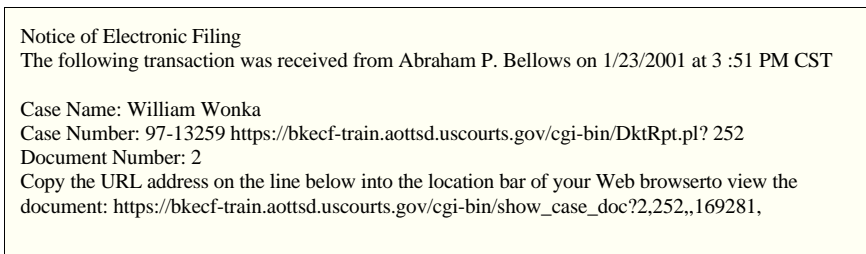
**Docket Text:**  
Objection to Claim Filed by Debtor Dale I Danniels . (Wilson, Joe)

**Figure 3b**



**text format for cc:Mail, GroupWise, other E-mail service**

Text format will feature the URL of the PDF document which can be copied and pasted into the location bar of your browser.  
**Figure 3c** shows an example of a text formatted notice.



Notice of Electronic Filing

The following transaction was received from Abraham P. Bellows on 1/23/2001 at 3:51 PM CST

Case Name: William Wonka  
Case Number: 97-13259 [https://bkecf-train.aottd.uscourts.gov/cgi-bin/DktRpt.pl? 252](https://bkecf-train.aottd.uscourts.gov/cgi-bin/DktRpt.pl?252)  
Document Number: 2  
Copy the URL address on the line below into the location bar of your Web browser to view the document: [https://bkecf-train.aottd.uscourts.gov/cgi-bin/show\\_case\\_doc?2,252,,169281,](https://bkecf-train.aottd.uscourts.gov/cgi-bin/show_case_doc?2,252,,169281)

**Figure 3c**



When you have entered your E-mail preferences, click on

[Return to Account screen].

- ◆ Click on [Submit] to save the changes.

**STEP 4** The **SELECT THE CASES TO BE UPDATED** screen will then appear for the user to select the effected cases. (See Figure 4.)

**Figure 4**

**NOTE:** Modifications to NAME, SSN, TAX ID, or BAR ID will automatically update ALL cases.

- ◆ Select desired cases and then click [Submit].

The screen in **Figure 4a** is used to confirm the information which has been submitted. If you checked any of the boxes for sending notices for each filing, or sending a Summary report, this screen will indicate the option is turned "on".

Any additional case numbers (and hyperlinks) will be displayed under the **Case list:** heading. If invalid case numbers were entered, you will receive an error message after submitting the data and be given the chance to back up and enter a valid number.



**ECF** Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

Updating person record...  
Update Person Prid: 333454

The update was successful.... prid 333454 - D.L. Wilson

The update was successful....

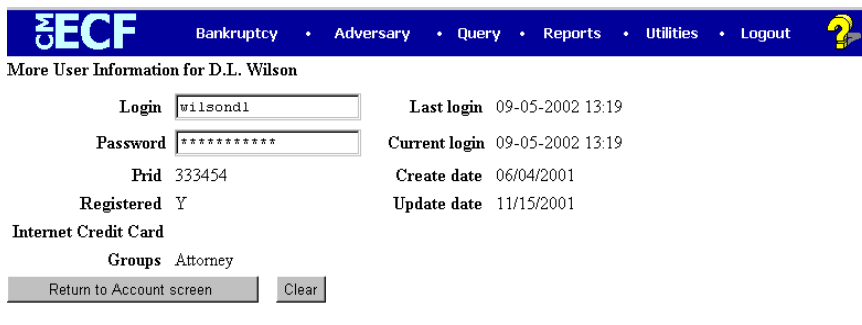
Set up automatic e-mail notification complete for D.L. Wilson  
Send Notification in all cases for which you represent a party = on  
Send Notification to primary e-mail address = on  
Case list:  
[99-11223 Pinzy Wilson](#)  
[99-11225 Timothy Tisdale and Barbara Tisdale](#)

E-mail notice of electronic filings for selected cases= on  
Summary e-mail = off  
Primary e-mail Address: DLWilson@lawfirm.net  
Additional e-mail Address:

**Figure 4a**

**STEP 5**

If you click on **More user information** from your account screen, your login and password information will be displayed  
(See Figure 5.)



**ECF** Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

More User Information for D.L. Wilson

Login	<input type="text" value="wilsondl"/>	Last login	09-05-2002 13:19
Password	<input type="password" value="*****"/>	Current login	09-05-2002 13:19
Prid	333454	Create date	06/04/2001
Registered	Y	Update date	11/15/2001

Internet Credit Card

Groups Attorney

**Figure 5**

- ◆ You can change your own login and/or password here.

Remember:

- Logins and passwords are case sensitive.
- These are alphanumeric fields
- Passwords have a maximum of 8 characters
- When you enter a new password it is displayed on the screen. Your subsequent queries to this screen will show only asterisks.  
(No one will be able to tell you what your password is. Contact the

court if you forget your password.)

- ◆ When you have entered the information as desired, click on **[Return to Account screen]**.

#### STEP 6

Your user account screen will appear again (See Figure 6.)

Figure 6

- ◆ When all of your account information is correct, click **[Submit]** to finish processing.

#### STEP 7

A list of the cases you are associated with will then appear (See Figure 7.)

Figure 7

- ◆ If you want this new information to apply to all of the cases, click on **\*\*\*Update All\*\*\*** at the top of the list. To change information only on certain cases, hold down the **[Control]** key after selecting the first case number and click on the others, one at a time, to highlight them.
- ◆ When you have all of the desired cases or **[ \*\*\*Update All\*\*\*]** highlighted, click **[Submit]** to apply the new information.
- ◆ The system will update the records and inform you that they were updated. You can then click on another selection in the **CM/ECF Main Menu Bar**.

NOTE: Modifications to NAME, SSN, TAX ID, or BAR ID will automatically update ALL cases.

## USER TRANSACTION LOG

All docketing activity is recorded through each user's **User Transaction Log**. This feature is found under Utilities on the CM/ECF Main Menu Bar. Information on this log can be selected by date range. A typical excerpt from a transaction log is displayed below. (See Figure 8.)

Transaction Log			
Report Period: 08/28/2000 - 09/05/2002			
Id	Date	Case Number	Text
0	08/22/2002 09:23:54	1-02-bk-10070	First Meeting of Creditors with 341(a) meeting to be held on 09/20/2002 at 01:30 PM at Room 101 U.S. Trustee's Office. Objections for Discharge due by 11/19/2002. (Wilson, D.L.)
6562	06/04/2001 10:33:48	01-10002	Opened New BK Case 01-10002
7509	08/02/2001 09:55:35	01-10015	Opened New BK Case 01-10015
7514	08/02/2001 09:56:38	01-10015	Motion to Avoid Lien with <i>Landry Restaurant Supply</i> Filed by Karen Houghston. (Wilson, D.)
7524	08/02/2001 10:08:14	01-10015	Stipulation By Karen Houghston and Between Landry Restaurant Supply filed by Karen Houghston. (Wilson, D.)
7526	08/02/2001 10:11:46	01-10015	Motion to Withdraw as Attorney Filed by Karen Houghston. (Wilson, D.)
11638	08/02/2002 16:38:07	02-40006	Opened New BK Case 02-40006
12185	08/20/2002 15:21:40	02-10070	Opened New BK Case 02-10070
12342	08/22/2002 10:19:13	1-02-bk-10070	Application to Pay Filing Fee in Installments Filed by Debtor Walter J. Daniels (Wilson, D.L.)

Figure 8

This record may be useful in researching case filings. Dates, case numbers, times and document type are tracked.

Your transaction activity is not accessible to other users besides yourself except for court systems staff.

## Converting Documents to .pdf

Only **.pdf** (Portable Document Format) documents may be filed using the Court's electronic filing system. If you attempt to upload a non-pdf file, or submit a standard docket entry without a document, an error message appears. (See Figure 1)

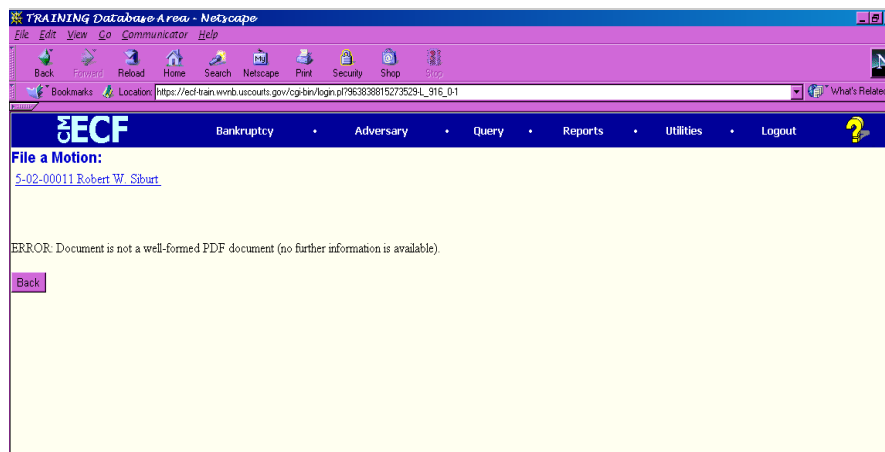


Figure 1

### Converting a Document to .PDF Format

Conversion of any word processing document to a Potable Document Format (.pdf) is required before submission to the Court's electronic filing system. The following instructions will guide you through the process of converting a word processing document to .pdf. For this example, WordPerfect 9 is used.

When Adobe Acrobat (the full version, not the reader is installed on your computer, one of the option installed is PDF Writer. To convert a word processing document to .pdf, you will choose "print" (just as you do to print a file), but change your default printer to PDF Writer. By making this selection, your document won't be printed, instead it will give you the opportunity to save your file in .pdf format and give it a filename. You should have a directory on your pc or network available for saving these .pdf files.

The conversion process is relatively simple and can be accomplished in a few ways depending upon the word processing program you use. In the following pages, we will walk you through the basic steps of converting any file created by a Windows based program. In some instances,

some of these steps may be eliminated depending on what software you are using and how your system has been configured.

Your bankruptcy preparation software may convert documents to .pdf. Refer to your software vendor regarding converting to .pdf.

Basic requirements for creating .pdf files:

- ! Word processing software. For example: Microsoft Word or WordPerfect.
- ! Adobe Acrobat PDF Writer

## Converting a Word Processing Document to .pdf Format

**STEP 1** Using your Word Processing Software, open the document you wish to convert to .pdf and review the document for accuracy.

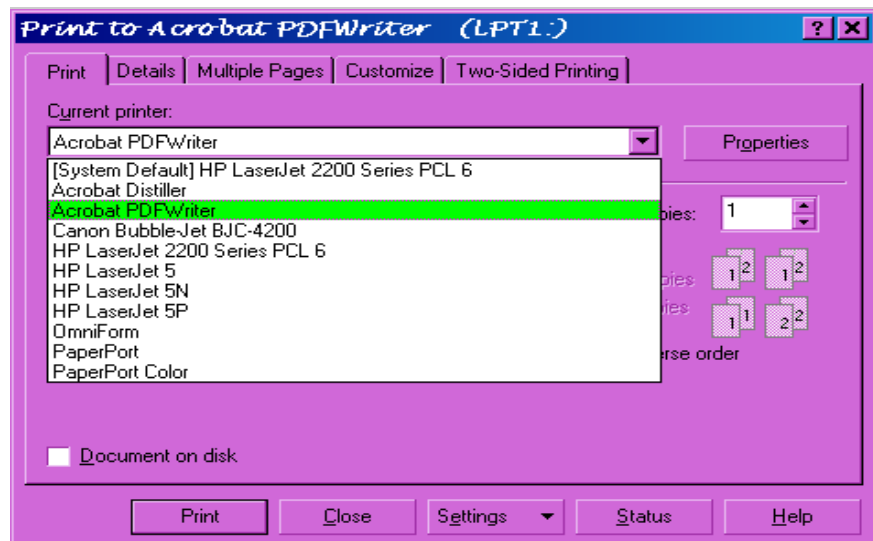
**STEP 2** To begin the conversion process, click the printer icon on your toolbar or using the menus, click **file** and **print**. (See **Figure 2**)



**Figure 2**

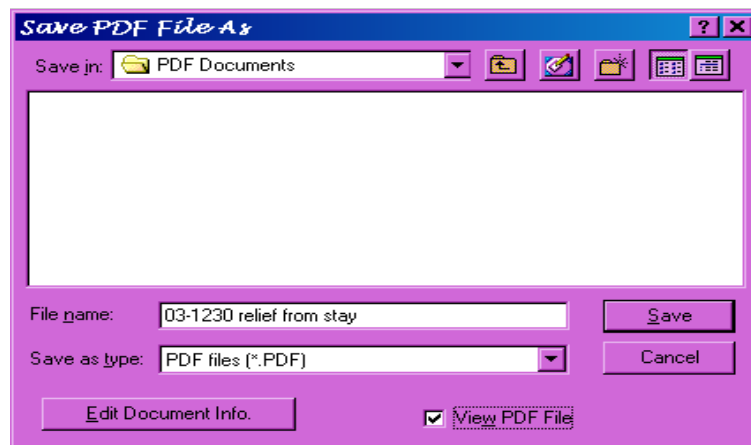
**STEP 3** The **Print** dialog box appears (See **Figure 3**)

- Select **Acrobat PDFWriter** from your list of printers.
- Click the **Print** button in the dialog box. The file will not actually print.

**Figure 3**

**STEP 4** You will then receive the option to save the file as .pdf.

- The **Save PDF File As** screen will appear  
(See Figure 4)

**Figure 4**

- **File Name:** type a name using your preferred naming convention.
- **Save as type:** Use drop down arrow if needed so that **PDF files (\*.PDF)** is selected.

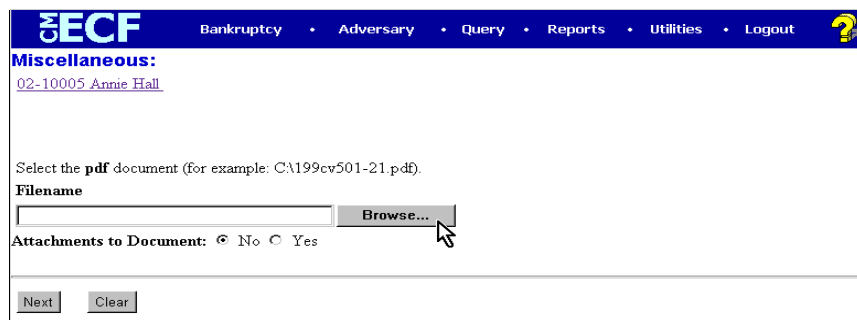
- Click on the **Save** button to save the file as a PDF document to a location where it may easily be retrieved later.

**Note: It is strongly suggested that you create a folder (or folders) specifically to store your pdf documents.**

## Attaching PDF Files During Docketing

**STEP 1** During Docketing you will be prompted to attach your pdf document.

- The **PDF DOCUMENT** screen is displayed. (See Figure 5)



CM/ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

**Miscellaneous:**  
[02-10005 Annie Hall](#)

Select the **pdf** document (for example: C:\199cv501-21.pdf).

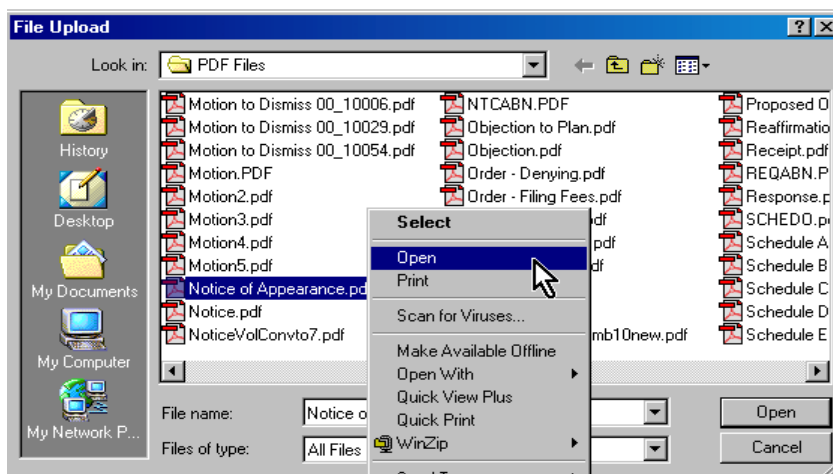
Filename

Attachments to Document: ☒ No ☐ Yes

**Figure 5**

**STEP 2** Click on the **Browse** button, then navigate to the directory where the appropriate PDF file is located and select it with your mouse.

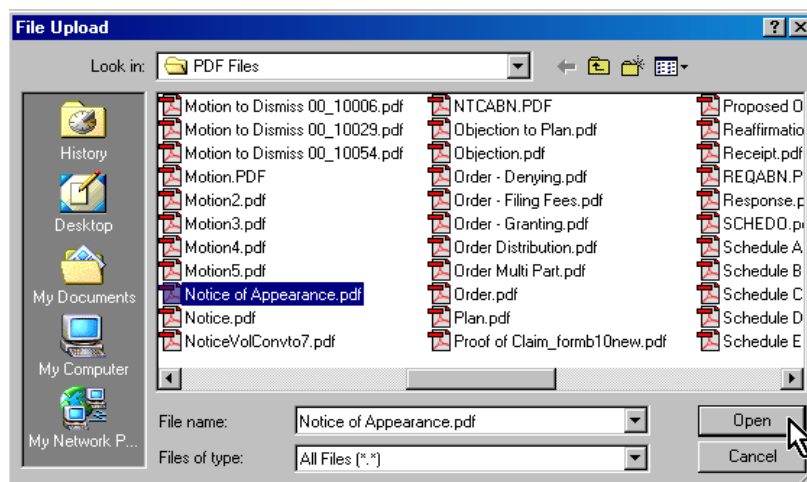
**STEP 3** To make certain you are about to associate the correct PDF file for this entry, right-click on the filename with your mouse and select **Open**. (See Figure 6)

**Figure 6**

- This will launch the Adobe Acrobat Reader to display the contents of the PDF document. Verify that the document is correct.

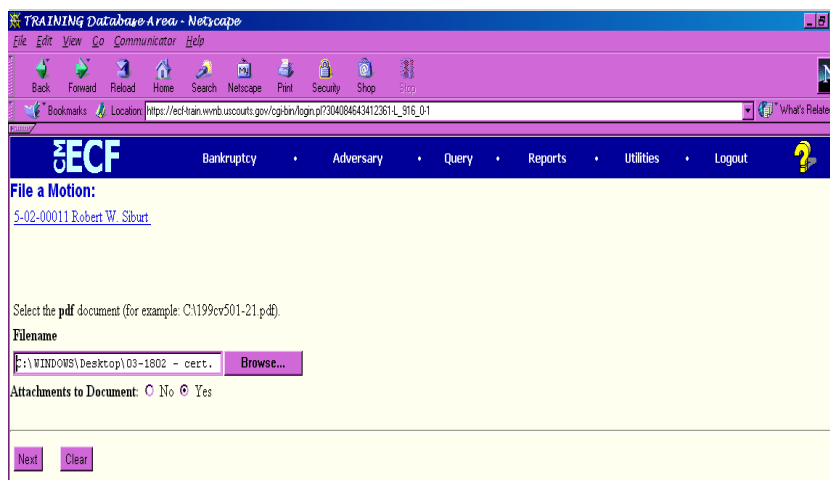
**STEP 4**

Close or minimize the Adobe application after verifying the correct file and click **Open** on the File Upload dialogue box. (See Figure 7)

**Figure 7****STEP 5**

To add an attachment, such as a **proposed order, exhibit, etc.**

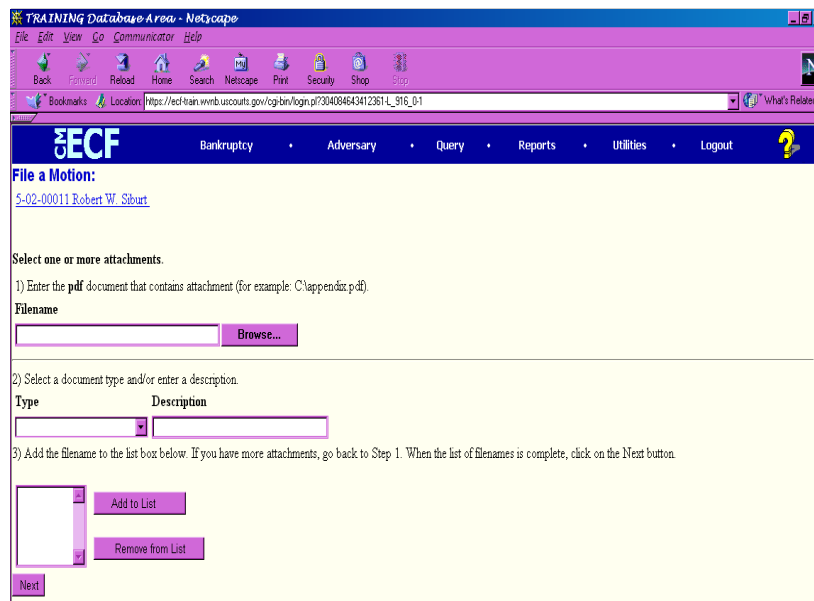
click the **yes** radio button next to “Attachments to Documents” and click **next**. (See Figure 8)



**Figure 8**

**STEP 6**

The **Select one or more attachments** screen will appear.  
(See Figure 9)



**Figure 9**

**STEP 7**

- Click on the **Browse** button to search for the file you would

like to attach. (Just as you would do when browsing for your main document)

- Under **step 2**, click on the drop-down arrow and choose what document type you are attaching, if it a **proposed order**, choose that type.
- Then type in a **description**  
(See Figure 10)

TRAINING Database Area - Netscape

File Edit View Go Communicator Help

Back Forward Reload Home Search Netscape Print Security Shop

Bookmarks Location: [https://ecftrain.wvnb.uscourts.gov/cgi-bin/login.pl?304084643412361-L\\_316\\_01](https://ecftrain.wvnb.uscourts.gov/cgi-bin/login.pl?304084643412361-L_316_01)

ECF Bankruptcy Adversary Query Reports Utilities Logout

File a Motion:  
[5-02-00011 Robert W. Stuart](#)

Select one or more attachments.

1) Enter the pdf document that contains attachment (for example: C:\appendix.pdf).

Filename  
 

2) Select a document type and/or enter a description.

Type	Description
<input type="text" value="Proposed Order"/>	<input type="text" value="for Motion to Amend"/>

3) Add the filename to the list box below. If you have more attachments, go back to Step 1. When the list of filenames is complete, click on the Next button.

<input type="text"/>	<input type="button" value="Add to List"/>
<input type="text"/>	<input type="button" value="Remove from List"/>

Figure 10

## STEP 8

Click on **Add to List**. When you do this, the pathname of where your document was stored will appear in the box in step 3 and the boxes in steps 1 and 2 will blank out. (See Figure 11)

The screenshot shows a Netscape browser window titled "TRAINING Database Area - Netscape". The address bar displays "https://ecf-train.wvrb.uscourts.gov/cgi-bin/login.pl?040846434123614\_316\_01". The page has a blue header with the ECF logo and navigation links: Bankruptcy, Adversary, Query, Reports, Utilities, and Logout. The main content area is yellow and titled "File a Motion:". Below the title is a link "5-02-00011 Robert W. Short". The instructions are as follows:

Select one or more attachments.

1) Enter the pdf document that contains attachment (for example: C:\appendix.pdf).

Filename

---

2) Select a document type and/or enter a description.

Type	Description
<input type="text"/>	<input type="text"/>

3) Add the filename to the list box below. If you have more attachments, go back to Step 1. When the list of filenames is complete, click on the Next button.

C:\WINDOWS\Desktop\Proposed Order 02-11.PDF	<input data-bbox="836 703 917 724" type="button" value="Add to List"/>
<input type="text"/>	<input data-bbox="836 745 933 766" type="button" value="Remove from List"/>

**Figure 11****STEP 9**

**If you have more documents to attach, start the process over by browsing for the next attachment and proceed to # 2 and then # 3, as shown in Figure 11.**

**If you are finished with adding attachments, click next.**

## How to Convert a Creditor Matrix to a .txt File

The following instructions will guide you to correctly format a creditor matrix and save it as a **.txt** file.

A creditor matrix contains each creditor's name and mailing address. This information is used for noticing and also for claims information when applicable. The creditor matrix must be in an ASCII file format with an appropriate text extension such as **.txt** before it can be successfully uploaded into the CM/ECF system.

### Suggested Creditor Matrix Specifications

- ◆ The name and address of each creditor cannot be more than 5 lines. If a record is more than 5 lines, the 6<sup>th</sup> line will be combined with line 5 and the 7<sup>th</sup> or 8<sup>th</sup> lines will be truncated.
- ◆ Each line may contain no more than 40 characters including blanks.
- ◆ Names and addresses should be left justified.
- ◆ Spaces in the first position of a line will cause an exception report for that creditor record.
- ◆ Special characters such as ~, ½, ^, #, /, &, and % will cause problems.
- ◆ Account numbers or "attention" lines should be placed on the second line of the name/address.
- ◆ City, state and ZIP code must be on the last line.
- ◆ Nine digit ZIP codes must be typed with a hyphen separating the two groups of digits.
- ◆ All states must be two-letter abbreviations.
- ◆ Each creditor must be separated by at least one blank line.
- ◆ Do not include page numbers, headers, footers, etc.
- ◆ If you are sending the matrix to the Court for upload into the system, we require it to be saved on a diskette or cd and the

filename should be the Debtor's last name or the business name.

## To Save the Creditor Matrix File with a .txt Extension

- STEP 1** After creating the creditor list in WordPerfect or Microsoft Word, open the file. Click on **File** in the WordPerfect or Microsoft Word toolbar to display the drop down list. (See Figure 1.)



Figure 1

- STEP 2** Click **Save As** in the drop down list. (See Figure 2.)

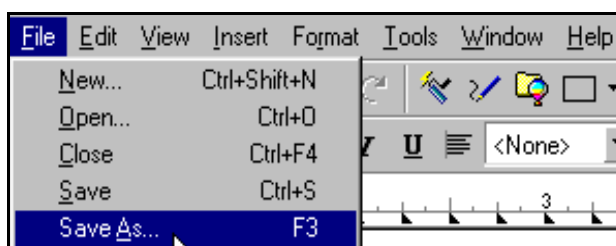


Figure 2

If in Microsoft Word, Skip to Step 4.

If in WordPerfect:

- STEP 3** Click the drop down menu arrow in the **File Type** box. (See Figure 3.)

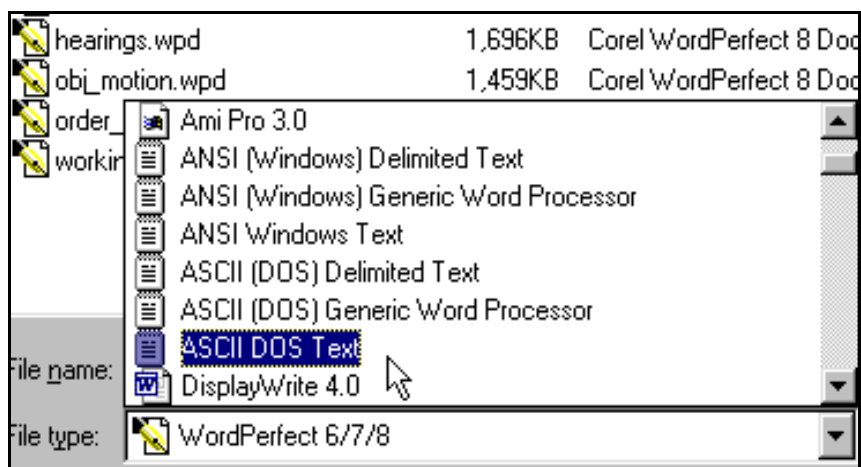


Figure 3

- ◆ Select the file type **ASCII DOS Text**.

**STEP 4**      **If in Microsoft Word:**

- ◆ Click on the drop down box arrow in the **Save As Type** box. (See Figure 4.)



**Figure 4**

- ◆ Select the file type of **Text Files(\*.txt)** or **Text Only(\*.txt)**.

**STEP 5**      Enter the file name (file name should be the Debtor's last name or if a business, the business name) in the **File Name:** box. (The system provides the same file name with a .txt extension.)

**STEP 6**      Click the **[Save]** button.

# Uploading a Creditor Matrix

## For Attorneys

The following instructions will guide you through the process of uploading creditor information (.txt file) to the Electronic Case Filing (ECF) system. A creditor matrix should be uploaded for each case immediately following the electronic case opening.

- STEP 1** Select **Bankruptcy** from the **Main Menu** and click on **Creditor Maintenance** from the **Bankruptcy Events** menu. (See Figure 1.)

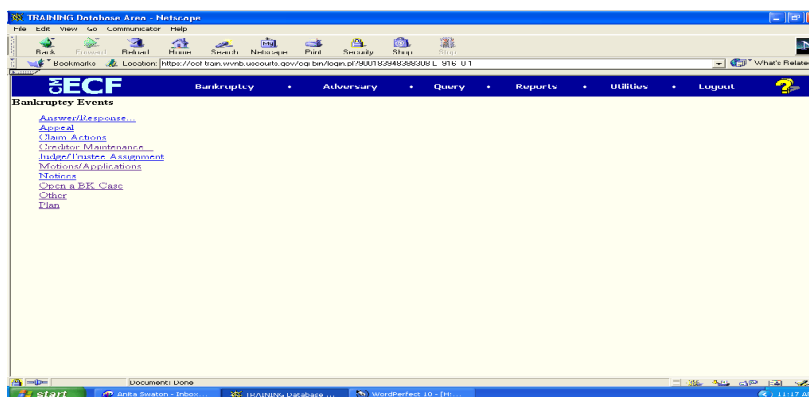


Figure 1

- STEP 2** Select **Upload a creditor matrix file** from the **Creditor Maintenance** menu. (See Figure 2.)

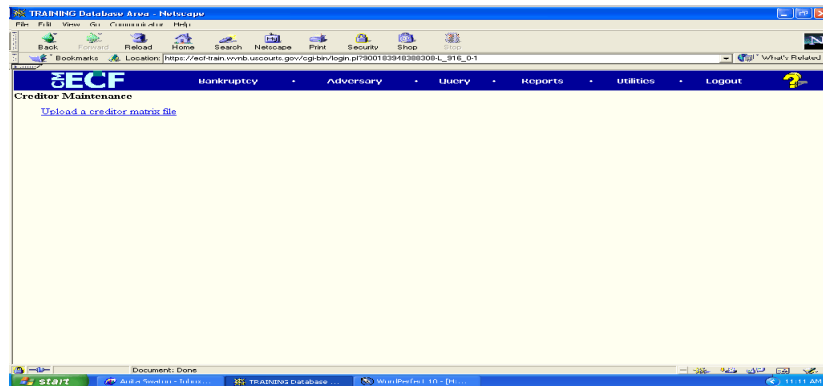


Figure 2

**STEP 3** The **Creditor Processing - Upload a File Method** screen appears. Enter the bankruptcy case number. (See Figure 3.)

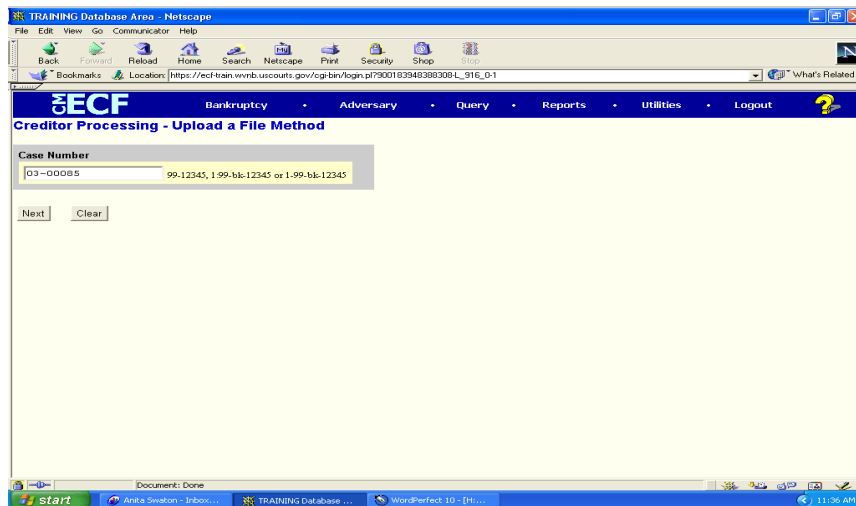


Figure 3

◆ Click **[Next]** to continue.

**STEP 4** The **Load Creditor Information** screen appears. (See Figure 4a.)

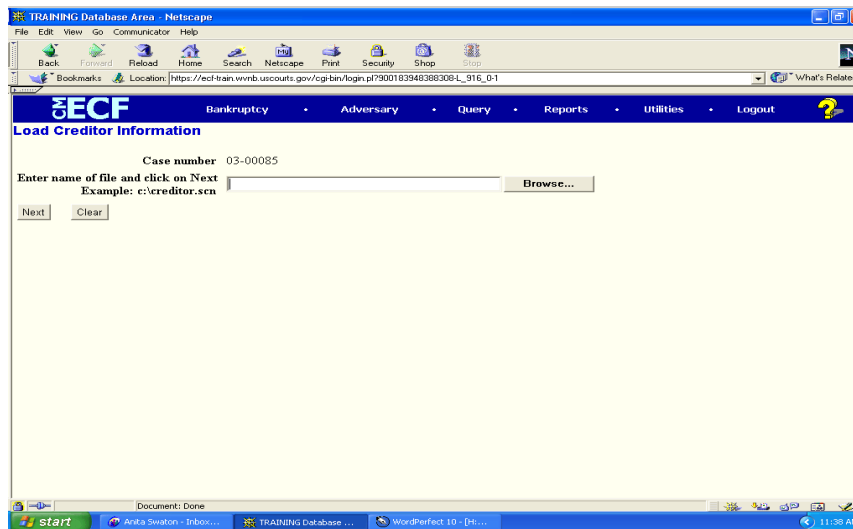


Figure 4a

- ◆ Verify the case number displayed.
- ◆ If the case number is incorrect, click the **[Back]** button to re-enter the case number.

**NOTE:** If the system prompts that you have entered an invalid case number, click the browser **[Back]** button to try again. You may use the browser **[Back]** button at any time during this process to verify former screens until the final submission.

- ◆ Type in the full path of the folder (directory) and filename where the creditor matrix file is located.

**OR**

- ◆ Use **[Browse]** to navigate to the appropriate folder and select the creditor matrix file. To do this:
  - ◆ Click the **[Browse]** button to display the **File Upload** screen.
  - ◆ Change **Files of type:** to *All Files (\*\*)*.
  - ◆ Click in the **Look In** box, and select the appropriate drive name.

- ◆ Double-click on the correct folder name to open the folder.
- ◆ Double-click to the appropriate filename to select the matrix.

**NOTE:** For quality assurance, with the matrix filename highlighted, you may right click and select **Open** on the drop down menu. This will allow you to view and verify the matrix file chosen as correct.

- ◆ Close the matrix by clicking the “X” in the upper right-hand corner.
- ◆ If changes were made, choose Yes when prompted “Do you want to save changes?”.
- ◆ Click the **[Open]** button in the **File Upload** screen to associate the matrix file to the bankruptcy case.

(See Figure 4b.)

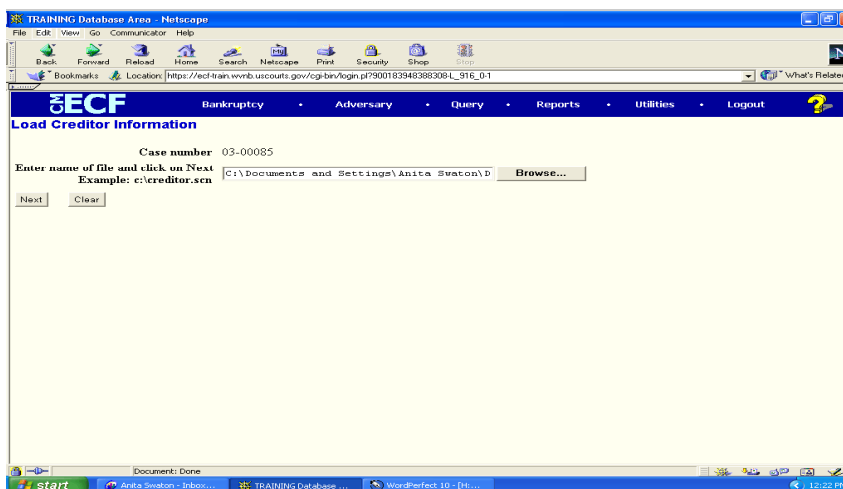


Figure 4b

- ◆ Click **[Next]** to continue.

**STEP 5** The **Total Creditors Entered** screen displays. (See Figure 5.)

- ◆ The total number of creditors shown on this screen must be the same as the number of creditors shown on the paper matrix which was imaged and included with the electronically-filed petition. If the Total Creditors Entered amount is correct, click **[Submit]** to finalize the transfer of creditors.
- ◆ If the creditor total is incorrect, return to **Step 1** to begin again.

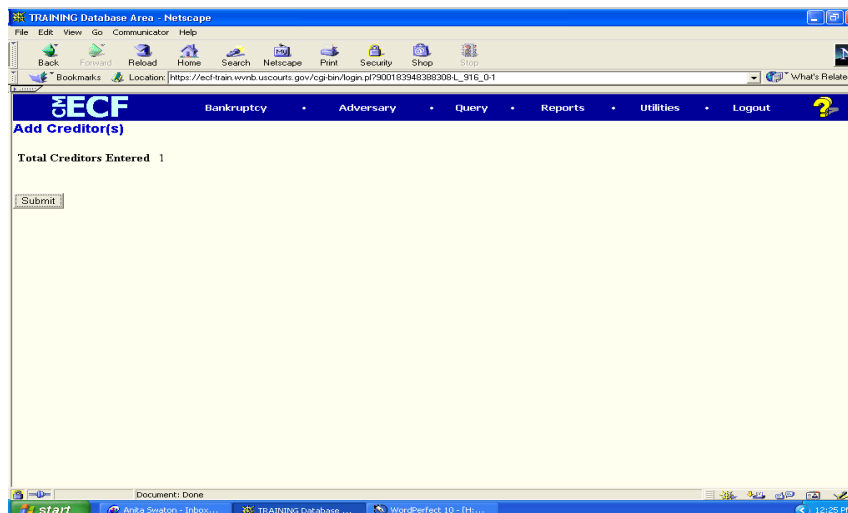


Figure 5

**STEP 6** The **Creditors Receipt** screen appears. (See Figure 6.)

- ◆ The case number and total number of creditors added to the database are confirmed.

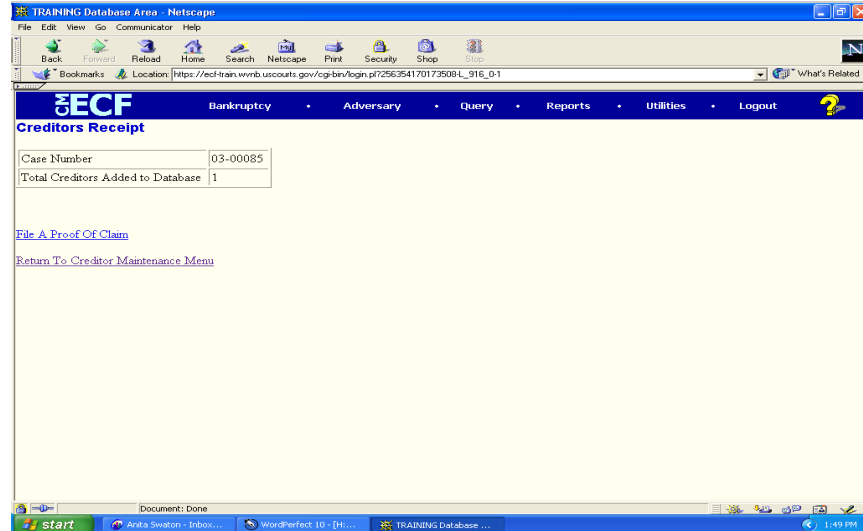


Figure 6

- ◆ Click the **Return To Creditor Maintenance Menu** hypertext link if you have additional creditor matrices to upload for other new bankruptcy filings, and repeat steps 3 - 5 for each additional creditor matrix.

# Bankruptcy Case Opening

This process shows the steps and screens required for attorneys to open a bankruptcy case on CM/ECF. The case is a chapter 7, no asset, individual consumer.

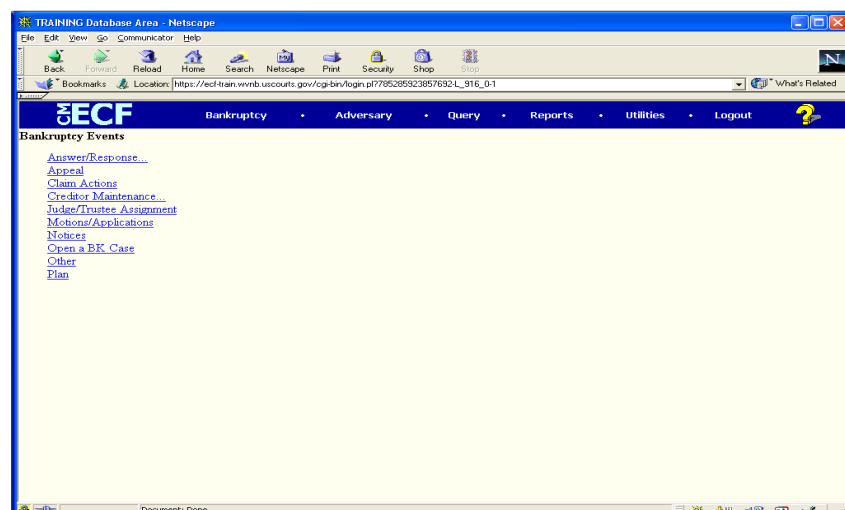
***Internet users will access CM/ECF through PACER and will use two different sets of logins and passwords; one for CM/ECF filing and the other for PACER access to queries and reports. This module will assume that the internet user has accessed the court's web site with their court assigned CM/ECF login and password. You can access this court's cm/ecf site by going to <https://ecf.wvnb.uscourts.gov>.***

**STEP 1** Click on the Bankruptcy hyperlink on the CM/ECF Main Menu Bar. (See Figure 1.)



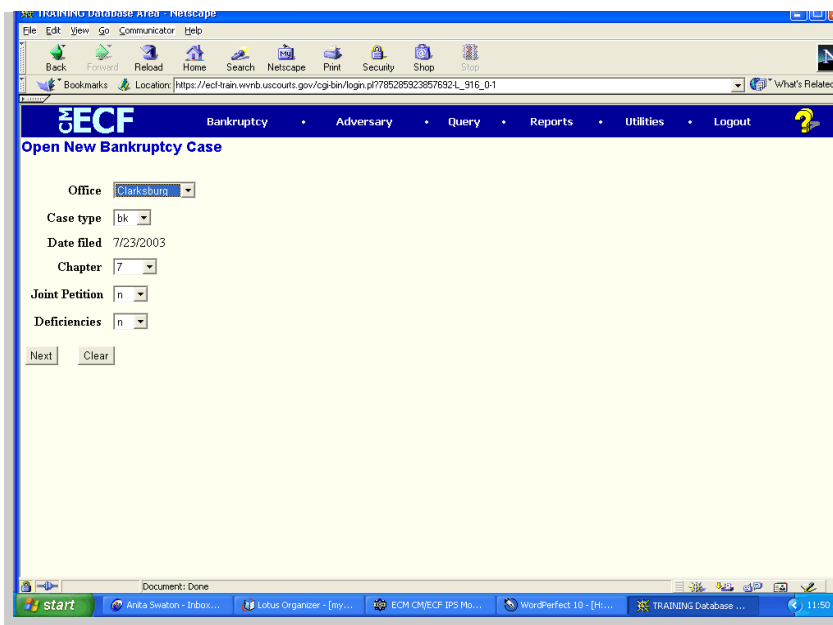
**Figure 1**

**STEP 2** The **BANKRUPTCY EVENTS** screen displays. (See Figure 2)



**Figure 2**

**STEP 3** At the Bankruptcy Events screen, click on the Open a BK Case hyperlink. The Open New Bankruptcy Case screen will display (See Figure 3.)



**Figure 3**

Click the drop down arrow to reveal the list of **Office** (division) options. Click to highlight the correct Office based upon the county shown on page one of the voluntary petition.

Select the **Clarksburg** Office for the following counties:

Braxton	Gilmer	Marion	Taylor
Calhoun	Harrison	Monongalia	Tyler
Doddridge	Lewis	Pleasants	Ritchie

Select the **Elkins** Office for the following counties:

Barbour	Mineral	Preston	Upshur
Grant	Pendleton	Randolph	Webster
Hardy	Pocahontas	Tucker	

Select the **Martinsburg** Office for the following counties:

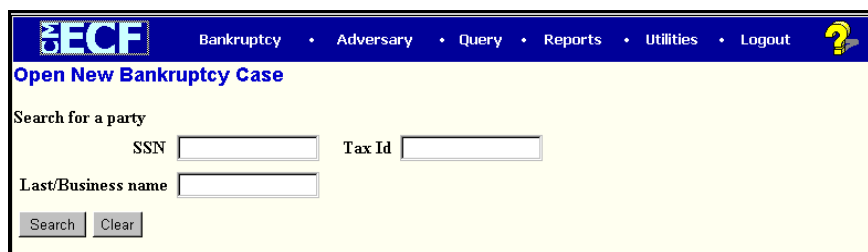
Berkeley	Hampshire	Jefferson	Morgan
----------	-----------	-----------	--------

Select the **Wheeling** Office for the following counties:

Brooke	Marshall	Wetzel
Hancock	Ohio	

- ◆ The case number will be generated later in this process and will be displayed on the Notice of Electronic Filing.
- ◆ The Case Type will always be **bk**. Leave it as it is.
- ◆ The current date will always be displayed in the **Date Filed** field. This date cannot be changed. The file date of the petition will be the current date.
- ◆ Click the down arrow to reveal the list of available **Chapter** options. Click to select the appropriate chapter.
- ◆ Click the down arrow to reveal the list of **Joint Filing** options. The default value for **Joint Petition** is **n** (no) meaning this is not a joint (husband and wife) filing. Accept the default, or click to select '**y**' to indicate the filing includes both a male and female debtor.
- ◆ If there are any required items missing from the petition, change the **Deficiencies** box from **n** to **y**. A deficiency list will then be presented on a later screen.
- ◆ When this screen is correct, click **[Next]** to continue.

**STEP 4** The **PARTY SEARCH** screen displays. (See Figure 4.)



**Figure 4**

- ◆ This screen is for you to enter the parties in the case. Before you add the debtor, or any party, you should search the database to see if that party already exists in the database from another case, to eliminate duplicate records in the system. You can search by Social Security Number, Tax Identification Number, Last Name or Business Name.
  - You can enter the last name to search the database. If this is a business filing, enter the first word or significant words of the business name to search. The entire business name is stored in the **Last/Business name** field. The field size is 200 characters.

**Search Hints**

- Enter one field of data for each search.
- Format Social Security Number or TaxID with hyphens.
- Include punctuation. (Garcia-Carrera)
- Try alternate search clues if your first search is not successful.
- Partial names can be entered.
- Wild cards (\*) should not be used at the end of search strings.
- Wild cards may be used before or within search strings. (\*son,Gr?y)
- The asterisk \* should not be used by itself. It will search ALL records in the database and use unnecessary system resources.

**NOT**

- E:** The entire name of businesses resides in the **Last/Business** field. Therefore, for business filings, entering the first part of the name may be sufficient to find a match.

**STEP 5** If there are no matches, the system will return a **No Person Found** message. (See **Figure 5a.**)

The screenshot shows the CM/ECF search interface. At the top, there is a navigation bar with links: Bankruptcy, Adversary, Query, Reports, Utilities, and Logout. Below this, the search area is titled 'Search for a party'. It contains two input fields: 'SSN' and 'Tax Id'. Below these is a 'Last/Business name' input field. There are 'Search' and 'Clear' buttons. Below the search area, the results section is titled 'Party search results' and displays the message 'No person found.' At the bottom of the results section is a 'Create new party' button.

**Figure 5a**

**NOTE:** Your name search may find more than one record having the same name as shown in **Figure 5b**. Clicking on each of the names will display a window showing the party's address information for verification.

If none of the addresses are correct for this party, you can either 1.) modify the address (for this case only) on the following PARTY INFORMATION screen, or 2.) click on the **[Create new party]** button to add a new person record with this address.

**NOTE:** If the information you entered to search finds a match, it is **very** important to verify that the social security number of the matching party name and address is correct. If you choose this as a match for your debtor, you will have no opportunity to modify the social security number. If the name and address are correct, **but** the social security number does **not** match, do **not** choose this as a match; add a new party.

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout

Search for a party

SSN  Tax Id

Last/Business name

Search Clear

Party search results

Susan Halston Interiors, Inc.

Select name from list Create new party

Person Address - Netscape

Susan Halston Interiors, Inc.  
45500 NW Loop 410  
Suite 450  
Alamo Heights, TX 78201

Figure 5b

- ◆ Once you have tried alternative searches and determined that the party is not already on the database, you can add them to the database. Click **[Create New Party]**.

**STEP 6** The **PARTY INFORMATION** screen displays. (See Figure 6.)

TRAINING Database Area - Netscape

File Edit View Go Communicator Help

Back Forward Reload Home Search Netscape Print Security Shop

Bookmarks Location: https://ecf-train.vnb.uscourts.gov/cgi-bin/login.pl?222413940352489L\_916\_01

What's Related

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout

Party Information

Last name  Willard First name

Middle name  Generation  Title

SSN  222-11-1234 Tax ID

Office  Address 1

Address 2  Address 3

City  State  Zip

County  Country

Phone  Fax

E-mail

ProSe  Role

Party text

Alias... Review... Add all aliases before clicking the Submit button.

Submit Cancel Clear

Document: Done

start Anita Swaton - Inbox... Lotus Organizer - [my... TRAINING Database ... WordPerfect 10 - [H...

9:43 AM

Figure 6

- ◆ As shown on the petition, enter the following information:
  - ◆ Debtor's **Last Name** (If the debtor is a business, enter the full business name in the **Last Name** field.)
  - ◆ Debtor's **First Name**
  - ◆ Debtor's **Middle Name**
  - ◆ Debtor's **Generation**, if applicable (Jr., Sr., III, II, etc.)
  - ◆ Debtor's **Title**, if applicable (MD, PHD, etc.)
  - ◆ **SSN** (Social Security Number), or **Tax ID** (if the debtor is a business)
  - ◆ The **Office** box may be used to indicate the office name of a business debtor. (This field is used infrequently.)
  - ◆ Use **Address 1**, **Address 2** and **Address 3** lines to type the debtor's mailing address as shown on the petition.
  - ◆ Type **City**, **State** and **Zip** information.
  - ◆ Click the down arrow to reveal the list of **County** options. Click to highlight the county shown on the petition. (Type the first letter of the county name for a faster search.)
  - ◆ It is not necessary to enter a **Country** name unless the country of the debtor's residence is not the United States.
  - ◆ Do not enter **Phone**, **Fax** and **E-Mail** information of the debtor.
  - ◆ The **ProSe** box automatically defaults to 'n' for no, meaning that the debtor is not representing himself. You will automatically be added as the attorney for the debtor by the CM/ECF system once the case is filed.
  - ◆ Verify that the **Role** type of **Debtor** is highlighted. If not, click the down arrow to reveal the list of role type options and select debtor.
  - ◆ The **Party Text** box can be used to add additional descriptive nature to the debtor's name. For example: If the debtor was General Foods Store, a division of General Motors Corporation, enter: *General Foods Store* in **Last name** field, and enter: *General Motors Corporation* in **Party text** field.
  - ◆ If this debtor has any aliases, click **[Alias]** to enter the alias information.
    - ◆ The **Alias** screen displays. (See Figure 7)

**ECF** Bankruptcy • Adversary • Query • Reports • Utilities • Logout

Alias Information (Party Willard, John William)

	Last/Business name	First name	Middle name	Generation	Role
1					aka
2					aka
3					aka
4					aka
5					aka

Add aliases Clear Click the Add aliases button to return to the Party screen and submit all information for this party.

Figure 7

**NOTE:** Do not use special characters such as parentheses, brackets, percent signs, ampersands and in care of's.

- ◆ You can enter up to five alias names at a time.
- ◆ Click the down arrow to reveal the list of options in the **Role** category. They include aka, dba, fdbs, and fka. Click to select the appropriate **Role** type for each alias entered.
- ◆ Click **[Add aliases]** to submit.
  - ◆ If you make a mistake during the addition of aliases, click **[Clear]** to begin again.
  - ◆ If you have more than five aliases to add for this debtor, click **[Add aliases]** to add the first five. Then click **[Alias]** again to submit additional aliases. This may be done as often as necessary until all aliases are added to the system.

STEP 7 The PARTY INFORMATION screen reappears. (See Figure 8a.)

TRAINING Database Area - Netscape

File Edit View Go Communicator Help

Back Forward Reload Home Search Netscape Print Security Shop

Location: https://ecf-train.wvmb.uscourts.gov/cgi-bin/login.pl?222413940352489L\_916\_0-1

What's Related

**ECF** Bankruptcy Adversary Query Reports Utilities Logout

**Party Information**

Last name: Willard First name: John

Middle name: William Generation: III Title:

SSN: 222-11-1234 Tax ID:

Office: Address 1: 123 Green Street

Address 2: Address 3:

City: Wheeling State: WV Zip: 26003

County: Ohio Country:

Phone: Fax:

E-mail:

ProSe: no Role: Debtor (db:pty)

Party text:

Alias... Review... Add all aliases before clicking the Submit button.

Submit Cancel Clear

Figure 8a

- ◆ Verify the debtor information shown.
- ◆ Once all debtor and alias information has been added, click **[Review]** to review the alias information for this debtor. (See Figure 8b.)

TRAINING Database Area - Netscape

File Edit View Go Communicator Help

Back Forward Reload Home Search Netscape Print Security Shop

Location: https://ecf-train.wvmb.uscourts.gov/cgi-bin/login.pl?222413940352489L\_916\_0-1

What's Related

**ECF** Bankruptcy Adversary Query Reports Utilities Logout

**Review attorneys and aliases**

John William Willard III

Uncheck to remove from list

**Attorneys added:**

None added

**Aliases added:**

☒ Willard, Bill (aka)

Return to Party screen Clear

Figure 8b

- ◆ You will see the aliases that have been added.
- ◆ This is where you must delete an incorrectly entered Alias. An alias cannot be edited. If there is anything incorrect about the alias entry, delete it here by clicking **[Clear]** to remove all checked aliases. Then select **[Return to Party screen]**, and click **[Alias]** to re-enter the correct alias information.
- ◆ You will note that in the **Attorney(s) added:** section this message **None added.** will display. CM/ECF knows who you are, based upon your attorney login, and will add you as the attorney for the debtor.
- ◆ Click **[Return to Party screen]** to continue.
- ◆ When all the information is correct, click **[Submit]** to continue.

**STEP 8** The **PARTY INFORMATION** screen will return again as shown in **Figure 8a**. If you are finished adding information for this new party, click **[Submit]** to continue with Case Opening.

**NOTE:** If this were a joint debtor filing, a **JOINT DEBTOR PARTY** screen would appear next. Repeat Steps 4 through 7 for the Joint Debtor.

**NOTE:** If this is a joint filing but was not indicated as such, or if this was inadvertently marked as a joint filing and there is no joint debtor, return to Step 1 and begin again.

- ◆ Once the Joint Debtor has been added to the case, click **[End party Selection]** in the **Search for a Party** screen and proceed to Step 9.

**STEP 9** The **STATISTICAL DATA** screen appears next. (See Figure 9.)

The screenshot shows a Netscape browser window titled "TRAINING Database Area - Netscape". The address bar displays a URL from the US Courts website. The page header includes the ECF logo and navigation links: Bankruptcy, Adversary, Query, Reports, Utilities, and Logout. The main heading is "Open New Bankruptcy Case".

The form contains the following fields and options:

- Type of debtor:** Radio buttons for Individual (checked), Corporation, Partnership, Other, Railroad, Stockbroker, and Commodity Broker.
- Fee status:** A dropdown menu with "Paid" selected.
- Nature of debt:** A dropdown menu with "consumer" selected.
- Voluntary:** A dropdown menu with "voluntary" selected.
- Origin:** A dropdown menu with "Original" selected.
- Date split/transfer:** A text input field.
- Asset notice:** A dropdown menu with "No" selected.
- Estimated number of creditors:** A dropdown menu with "1-15" selected.
- Estimated assets:** A dropdown menu with "\$0-\$50,000" selected.
- Estimated debts:** A dropdown menu with "1 \$0-\$50,000" selected.

At the bottom of the form are "Next" and "Clear" buttons. The browser's status bar shows "Document: Done".

Figure 9

- ◆ Select the **Type of Debtor** by clicking in the appropriate box(es).
- ◆ The **Fee Status** values are Paid and Installment. If the petition is accompanied by an Application to Pay Filing Fees in Installments, you would select Installment from the pick list box.
- ◆ Designate the **Nature of Debt** as Consumer or Business.
- ◆ The default value is for a **Voluntary** Petition. For Involuntary Petitions, select **Involuntary** from the pick list box.
- ◆ Enter the correct **Origin** code from the values Original, First Reopen, Second Reopen, Third Reopen, Split or Inter-District Transfer. No action is necessary if this is the first filing; the default value of Original is correct for this exercise.
- ◆ **Date Split/Transfer** is only necessary when a joint debtor splits from the original case or if this case was transferred in from another district. Otherwise leave this field blank.
- ◆ Choose Yes or No for **Asset notice** designation.
  - ◆ If the filing is a Chapter 9, 11, 12 or 13 petition, click to highlight **y** for an **asset** case.
  - ◆ If the filing is a Chapter 7 petition, accept the default **n** for a **no asset** case.
- ◆ Select the range of **Estimated Creditors** from the pick list box.

- 1 -15
- 16 - 49
- 50 - 99
- 100 -199
- 200 - 999
- 1,000 - over

◆ Select the correct dollar range for **Estimated Assets**.

- Under \$50,000
- \$50,001 - 100,000
- \$100,001 - 500,000
- \$500,001 - 1 million
- \$1,000,001 - 10 million
- \$10,000,001 - 50 million
- \$50,000,001 - 100 million
- More than \$100 million

◆ Select the correct dollar range for **Estimated Debts**.

- Under \$50,000
- \$50,001 - 100,000
- \$100,001 - 500,000
- \$500,001 - 1 million
- \$1,000,001 - 10 million
- \$10,000,001 - 50 million
- \$50,000,001 - 100 million
- More than \$100 million

◆ Click **[Next]** to continue.

**STEP 10** If you have selected **y** for **Deficiencies** on the **Case Data** screen, the **Deficiency List** screen will appear.  
**(See Figure 10.)**

**NOTE:** This list will vary by chapter.

◆ Check the check box for each item that is not included with this petition. The items chosen will be reflected in the Final Docket Text.

**Note:** The Court will issue a deficiency notice.

◆ Click **[Next]** to continue.

**ECF** Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

**Open New Bankruptcy Case**

**Deficiency List**

*Check item(s) NOT included in the petition*

- ☐ Atty Disclosure Stmt.
- ☐ Atty Sign. Exhibit B
- ☐ Atty Sign. Page 2
- ☐ Db. Sig. re: Relief Av.
- ☐ Inventory of Property
- ☐ List of All Creditors
- ☐ Schedule A
- ☐ Schedule B
- ☐ Schedule C
- ☐ Schedule D
- ☐ Schedule E
- ☐ Schedule F
- ☐ Schedule G
- ☐ Schedule H
- ☐ Schedule I
- ☐ Schedule J
- ☒ Schedules A-J
- ☐ SSN/Tax ID
- ☐ Stmt. of Fin. Affairs
- ☐ Summary of Schedules

Next Clear

Figure 10

**STEP 11** The **SELECT A PDF DOCUMENT** screen appears.  
(See Figure 11.)

**NOTE:** This screen is used for associating the imaged document with this entry.  
Attorneys may not bypass associating an imaged document.

**ECF** Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

**Open New Bankruptcy Case**

Select the pdf document (for example: C:\199cv501-21.pdf).

**Filename**

Browse...

Attachments to Document: ☒ No ☐ Yes

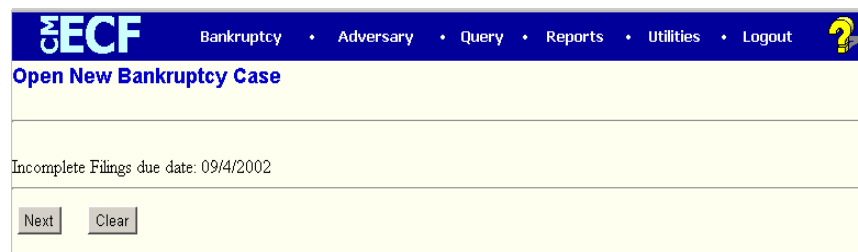
Next Clear

Figure 11

- ◆ Click **[Browse]**, then click on the down arrow ▼ for the **Files of type** field.
- ◆ In the drop-down box, click on **Acrobat (\*.pdf)**.

- ◆ Navigate to the directory where the appropriate PDF file is located.
- ◆ Highlight the file. Then right click with your mouse and select **Open** to verify the contents of the document. If this is the correct file, double-click the PDF file to select it.
- ◆ Accept the default setting of **No** for the **Attachments to Document** radio buttons. Attachments will be covered in another module.
- ◆ Click **[Next]**

**STEP 12** The **INCOMPLETE FILINGS DEADLINES** screen is presented, showing the due date for the missing schedules A-J. (See Figure 12.)



The screenshot shows the CM/ECF web interface. At the top is a blue navigation bar with the CM/ECF logo and links for Bankruptcy, Adversary, Query, Reports, Utilities, and Logout. Below the navigation bar is a yellow banner with the text 'Open New Bankruptcy Case'. The main content area is white and displays 'Incomplete Filings due date: 09/4/2002'. At the bottom of the main content area are two buttons: 'Next' and 'Clear'.

**Figure 12**

- ◆ The deadline for filing the missing documents is calculated and displayed. This will print on the final docket text and will exist as a schedule record for queries and reports.
- ◆ Deadlines will vary by court. The court will monitor deadlines for compliance and will verify deficiencies.
- ◆ Click **[Next]** to continue.

**STEP 13** The **RECEIPT #** screen appears. (See Figure 13.)

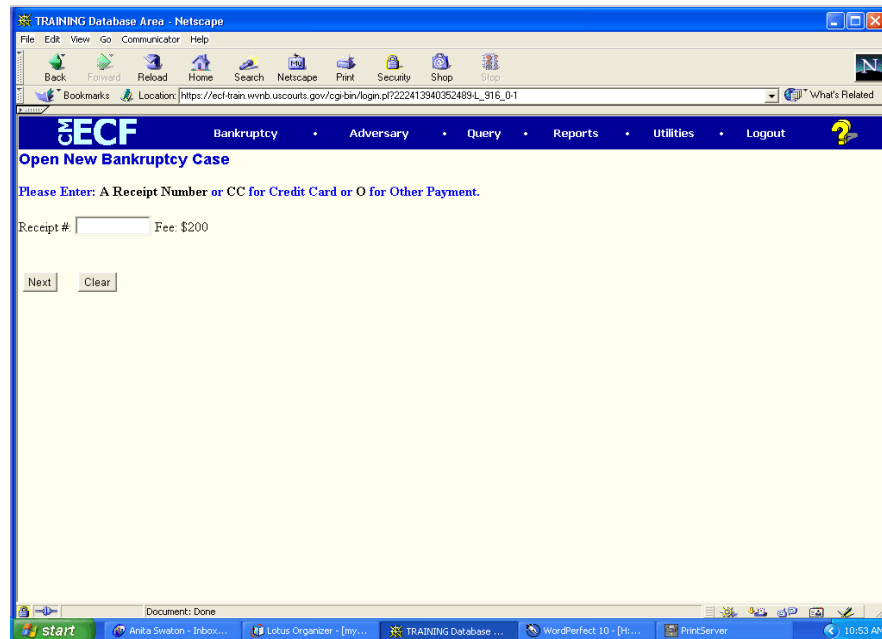


Figure 13

- ◆ Enter **CC** for credit card and click **[Next]** to continue.

**STEP 14** The **MODIFY DOCKET TEXT** screen appears. (See Figure 14.)

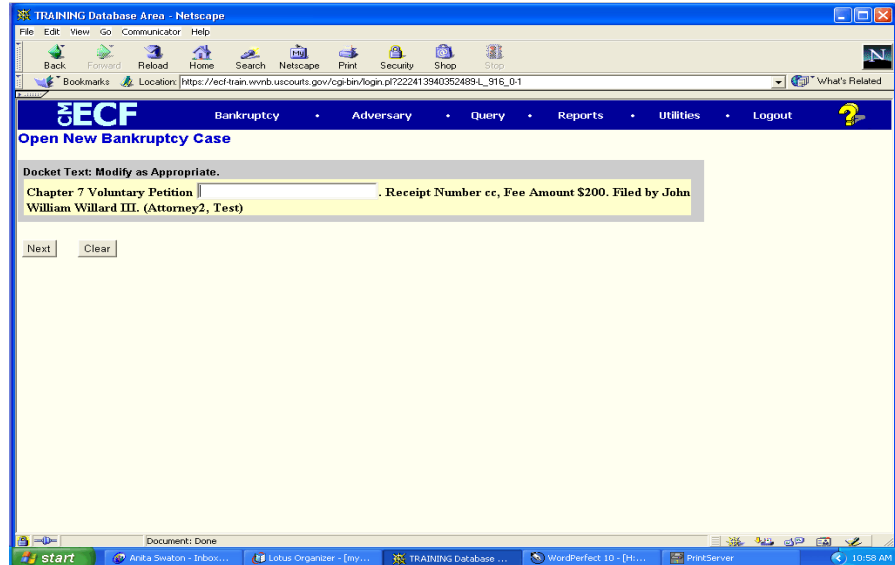


Figure 14

- ◆ Verify the accuracy of the Final Docket Text. This is what will print on the docket sheet.
- ◆ Click Next.

**STEP 15** The **FINAL TEXT EDITING** screen displays. (See Figure 15.)

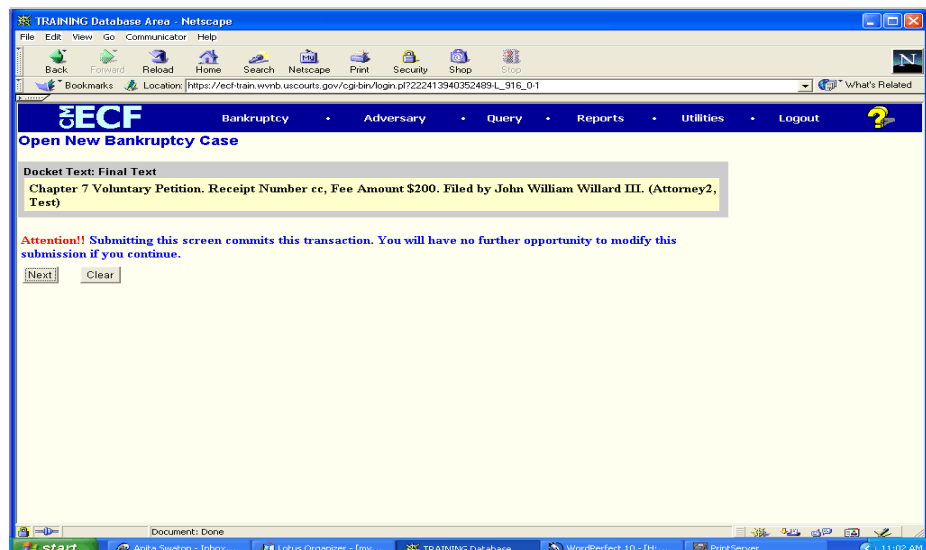


Figure 15

**NOTE:** This is the **last** opportunity to make any changes before the case is officially opened.

- ◆ Proof this screen carefully! This is what will print on the docket sheet.
- ◆ If the docket text is incorrect, click the browser **[Back]** button at the top of the screen one or more times to find the screen to be modified, make the correction, and continue through the event.
- ◆ To abort or restart the transaction, click on the Bankruptcy hyperlink on the **CM/ECF Main Menu Bar**. Although this can be done at any time, this is your last opportunity to change the event.
- ◆ The case number will now be assigned. Click **[Next]** to continue.

**STEP 16** The **NOTICE OF ELECTRONIC FILING** screen displays.  
(See Figure 16.)

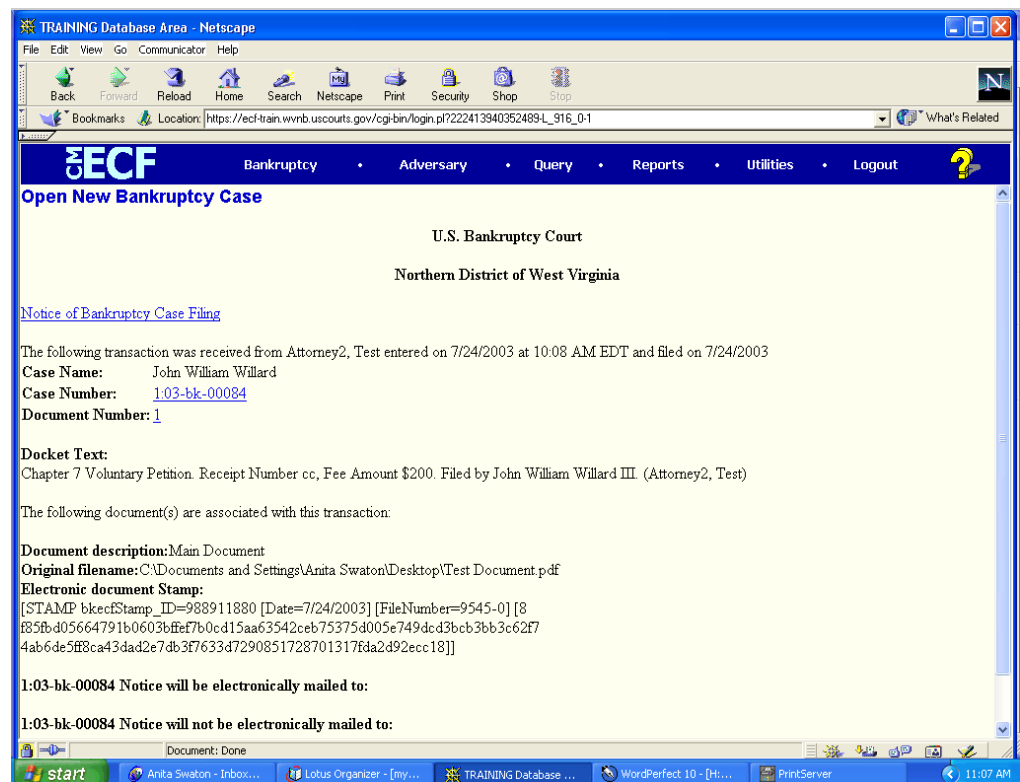


Figure 16

- ◆ This **Notice of Electronic Filing** is the verification that the filing has been sent electronically to the court's database. It certifies the that petition is now an official court document.
- ◆ Make a note of the case number, which appears in blue. Clicking on the case number hyperlink on the **Notice of Electronic Filing** will present the *Docket Report* for this case.
- ◆ Clicking on the document number hyperlink will present the *PDF Image* of the document just filed.
- ◆ To print a copy of this notice click the browser **[Print]** icon.
- ◆ To save a copy of this notice, click **[File]** on the browser menu bar and select **Save Frame As**.
- ◆ You may also save the notice through the browser **File/Save** option.
- ◆ A hypertext link for the **Notice of Bankruptcy Case Filing** appears at the top of this notice. Clicking on this hypertext link reveals a notice summarizing the pertinent details and participants in this case. (See Figure 17.)

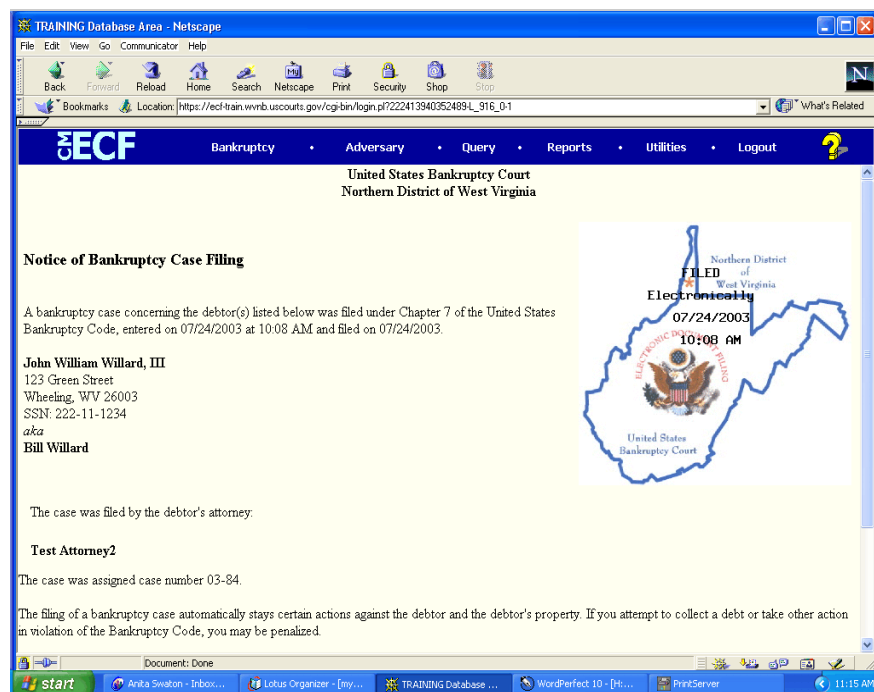


Figure 17

## Filing Schedules

This process shows the steps and screens required for an attorney to electronically file the schedules not filed with the bankruptcy petition.

**STEP 1** Click on the Bankruptcy hyperlink on the CM/ECF Main Menu Bar. (See Figure 1.)

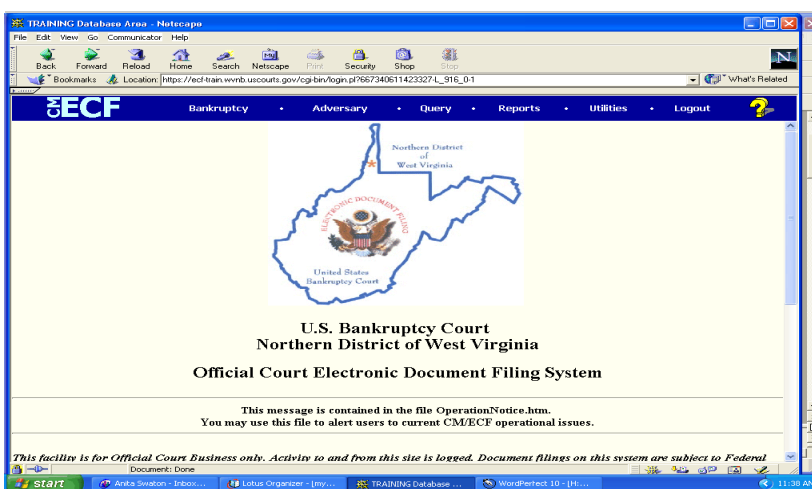


Figure 1

**STEP 2** The **BANKRUPTCY EVENTS** screen displays. (See Figure 2.)

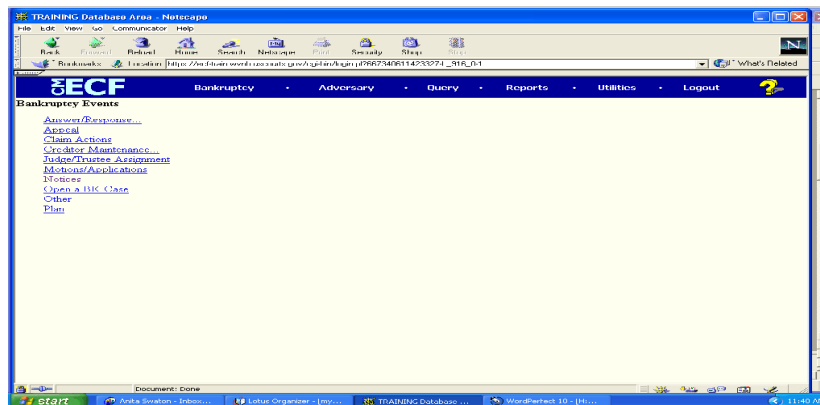
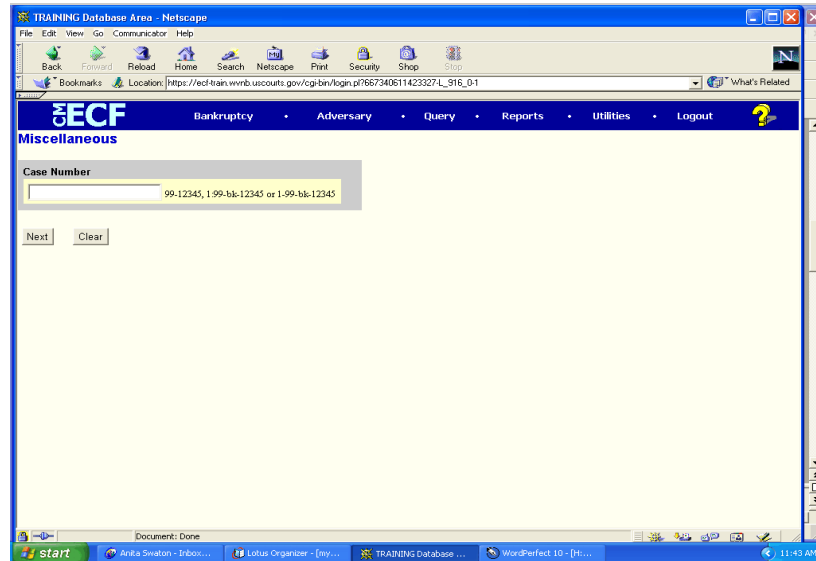


Figure 2

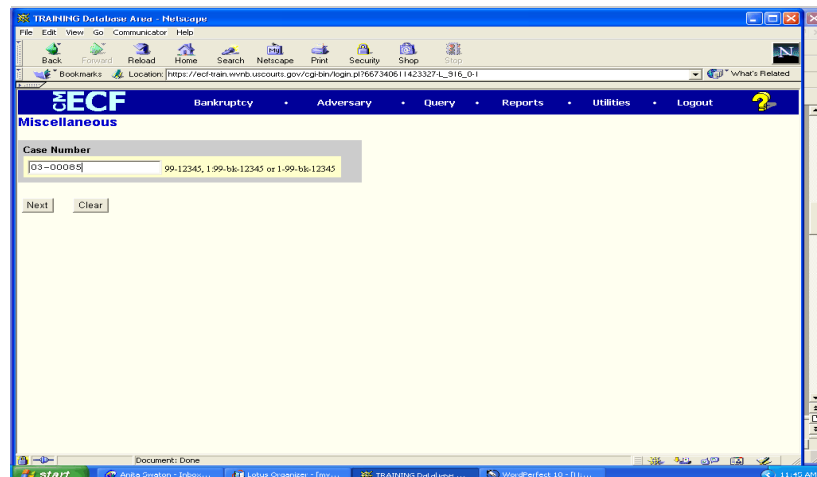
- ◆ Click the Other hyperlink.

**STEP 3** The **CASE NUMBER** screen displays. (See Figure 3a.)



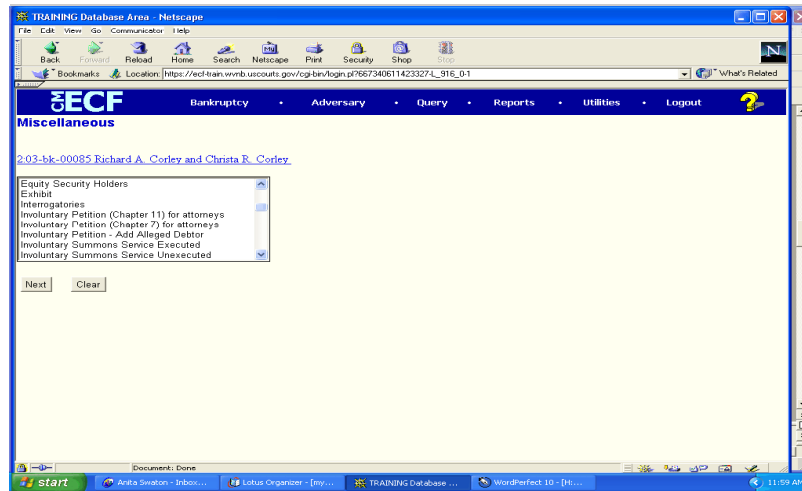
**Figure 3a**

- ◆ Enter the case number. (See Figure 3b.)

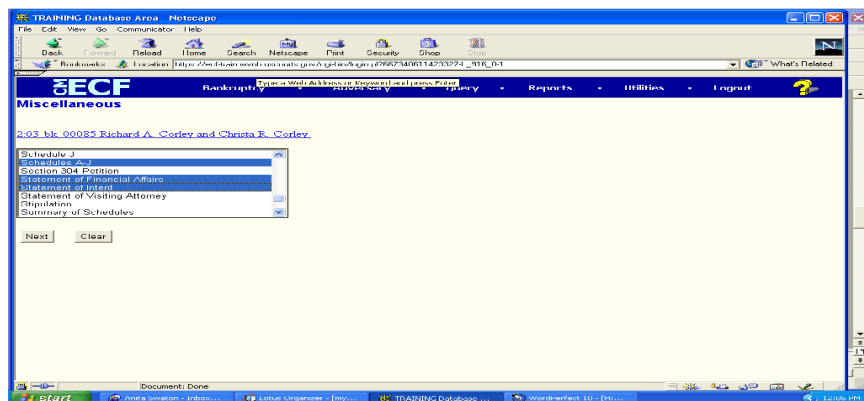


**Figure 3b**

- ◆ Click **[Next]** to continue.

**STEP 4** The following screen displays. **(See Figure 4a.)****Figure 4a**

- ◆ Using the up and down arrows to the right of the box, scroll the options to highlight the type of documents being filed. **(See Figure 4b)**
- ◆ For a Chapter 7 petition, required documents are Schedules A-J, Summary of Schedules, Disclosure of Compensation of Attorney for Debtor, Statement of Intent, Statement of Financial Affairs.
- ◆ For a Chapter 13 petition, required documents are Schedules A-J, Summary of Schedules, Disclosure of Compensation of Attorney for Debtor, Statement of Financial Affairs.
- ◆ Additional documents required in a Chapter 11 petition are Equity Security Holders and 20 Largest Unsecured Creditors

**Figure 4b**

- ◆ **STEP 5** Click **[Next]** to continue.  
The **Joint Filing With Other Attorneys** screen displays. (See Figure 5.)

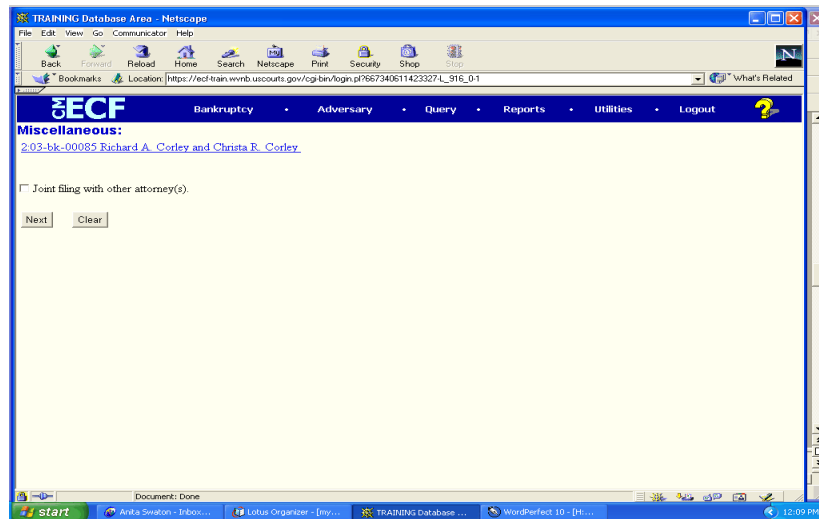


Figure 5

- ◆ Click in the **Joint filing with other attorney(s)** box only if this is a joint filing to add any additional attorneys.
- ◆ Click **[Next]** to continue.
- STEP 6** The **Select the Party** screen displays. (See Figure 6a.)

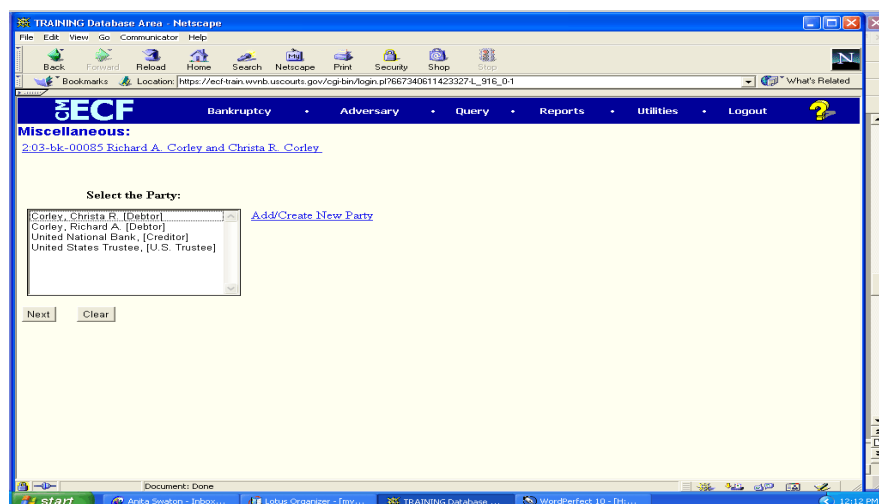


Figure 6a

- ◆ Select the debtor(s). (See Figure 6b.)

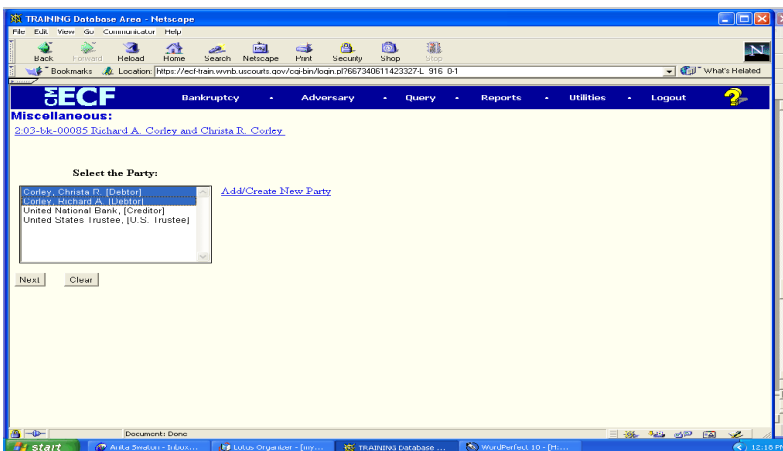


Figure 6b

- ◆ Click **[Next]** to continue.

**STEP 7** The **Select the pdf document** screen displays. (See Figure 7a.)

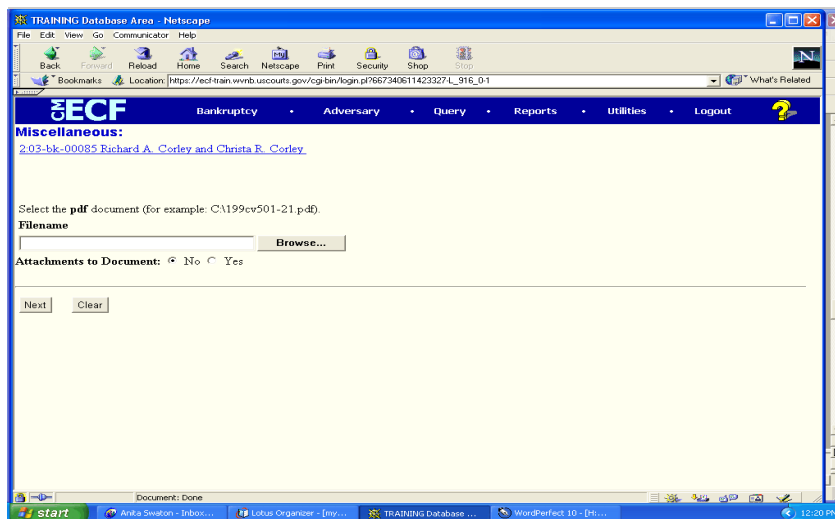


Figure 7a

- ◆ Click **[Browse]**, then navigate to the directory where the PDF file is located. Double-click the PDF file to select it.
- ◆ In the **File Upload** screen, change **Files of type:** to **All Files(\*.\*)**.

can

when

**NOTE:** If you wish to view the image before selecting to be sure you have chosen the correct file, before double-clicking, first right click on the highlighted filename and click on **open**. You

view the image in Adobe Acrobat, then close Adobe Acrobat

you have finished viewing the image.

(See Figure 7b.)

- ◆ The **Attachments to Document** option defaults to **No**. If you have attachments to this document, click the **Yes** radio button to indicate there are attachments. (Refer to module: *Attachments to Documents* for more information.)

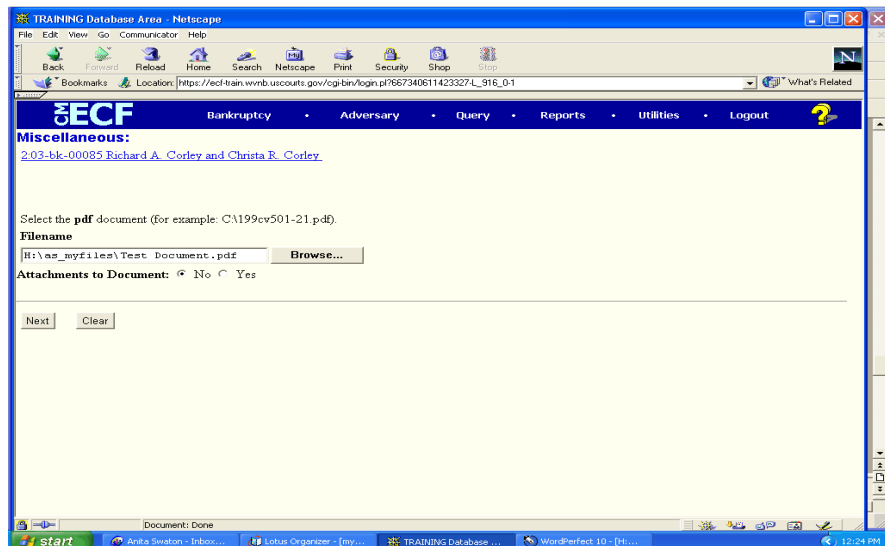


Figure 7b

- ◆ Click **[Next]** to continue.

**STEP 8** The **Docket Text: Modify as Appropriate** screen displays. (See Figure 8.)

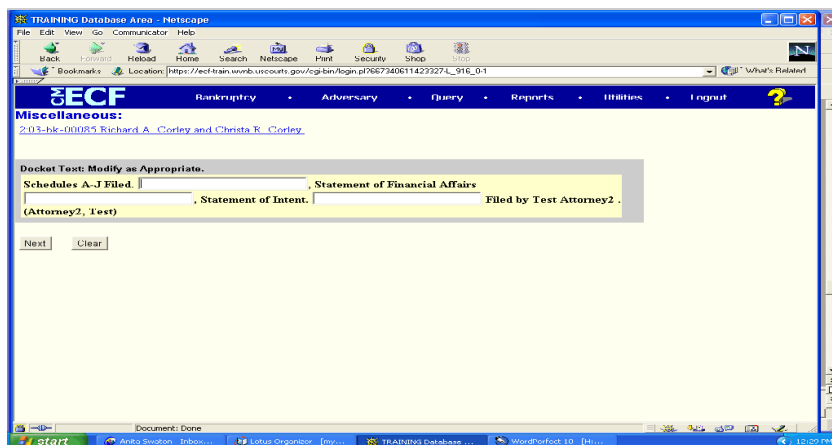


Figure 8

- ◆ It should not be necessary to make any additions to docket text.
- ◆ Click **[Next]** to continue.

**STEP 9** The **Docket Text: Final Text** screen displays. (See Figure 9.) This is your **last** opportunity to make corrections to your entry.

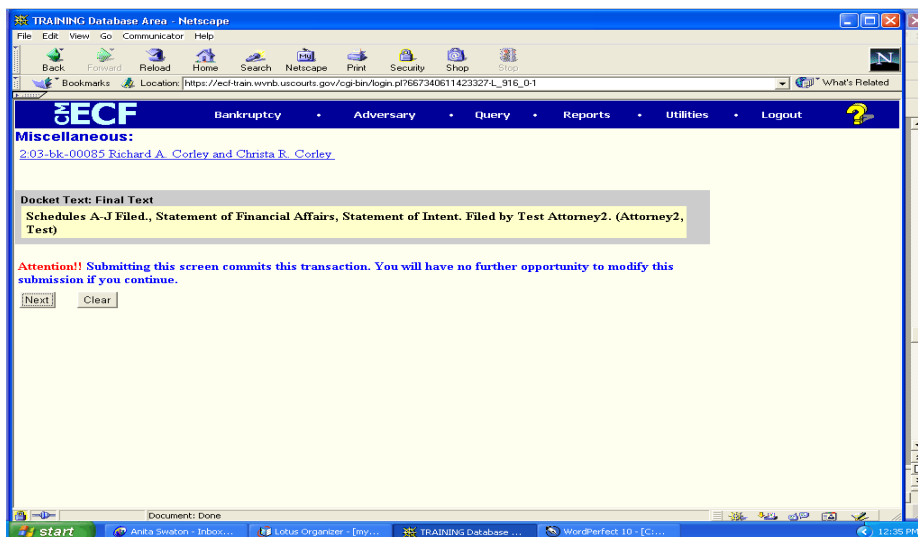
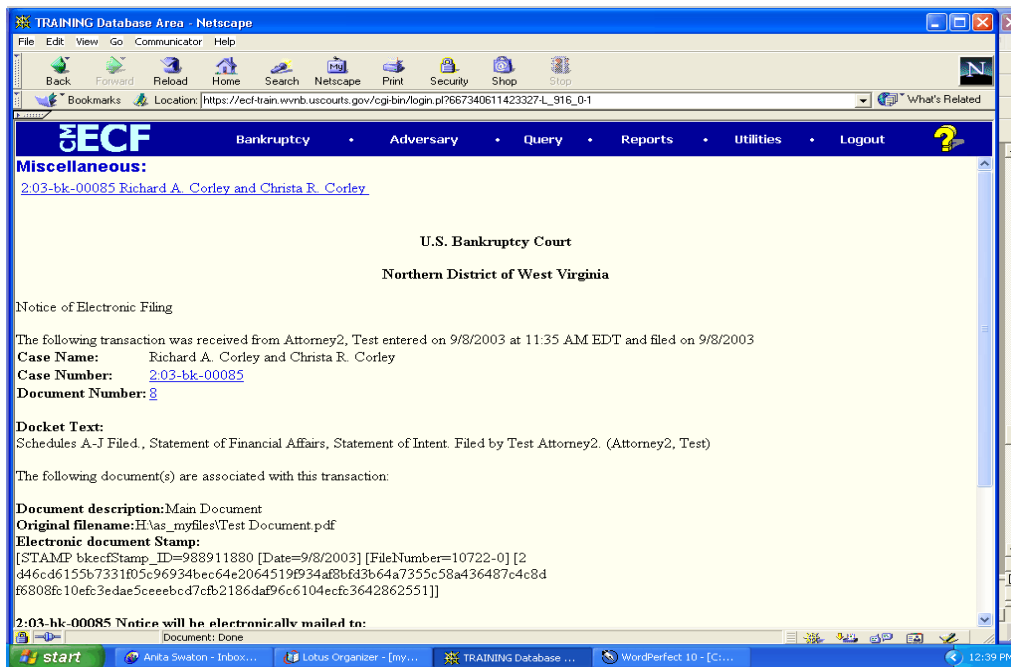


Figure 9

- ◆ Verify the final docket text.
  - ◆ If correct, click **[Next]** to continue.

- ◆ If the final docket text is incorrect, you must click on your Browser's **Back** button to correct your entries.
- ◆ To abort or restart the transaction, click on the **Bankruptcy** hyperlink on the Menu Bar.

**STEP 10** The **Notice of Electronic Filing** screen will display showing the essential data for this filing. Scroll down to view the entire receipt. (See Figures 10a and 10b.)



**Figure 10a**

- ◆ The notice will include the following information:
  - ◆ Who filed the document
  - ◆ Date and time
  - ◆ Case name
  - ◆ Case number
  - ◆ Document number
  - ◆ Original filename (pdf)
  - ◆ Electronic document stamp
  - ◆ Electronic mail recipients and manual notice lists

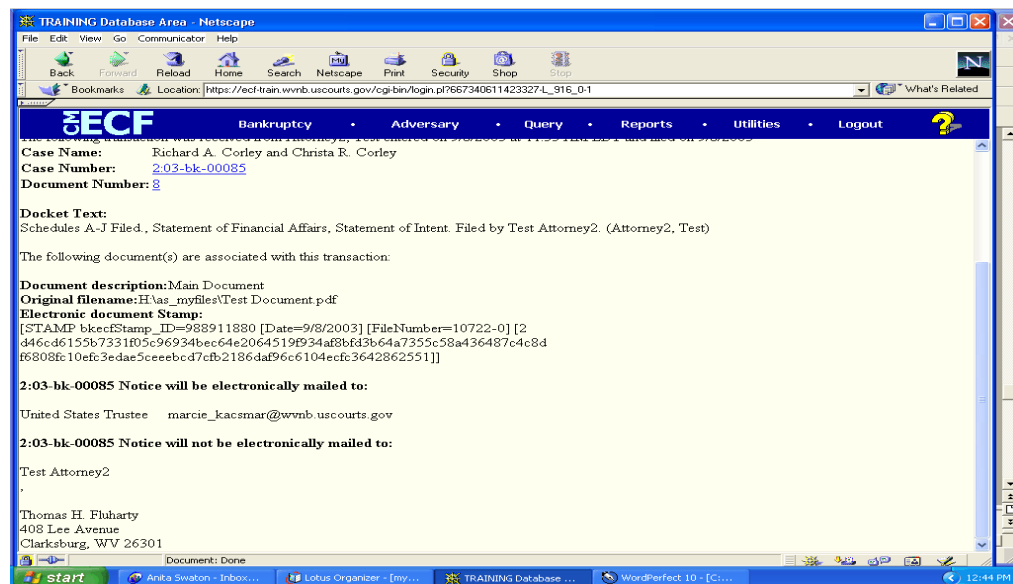


Figure 10b



## Amended Schedules

This process shows the steps and screens required for attorneys **(1)** to file Amended Schedules requiring a filing fee and not requiring a filing fee and **(2)** to file an Amended Matrix. If an amended matrix is being filed, the attorney should already have prepared an attachment captioned either Newly-Added Creditors or Modified Creditors.

**STEP 1** Click the Bankruptcy hyperlink on the CM/ECF main menu bar. (See Figure 1.)



Figure 1

**STEP 2** Click on the Other hyperlink displayed on the **BANKRUPTCY EVENTS** screen. (See Figure 2.)

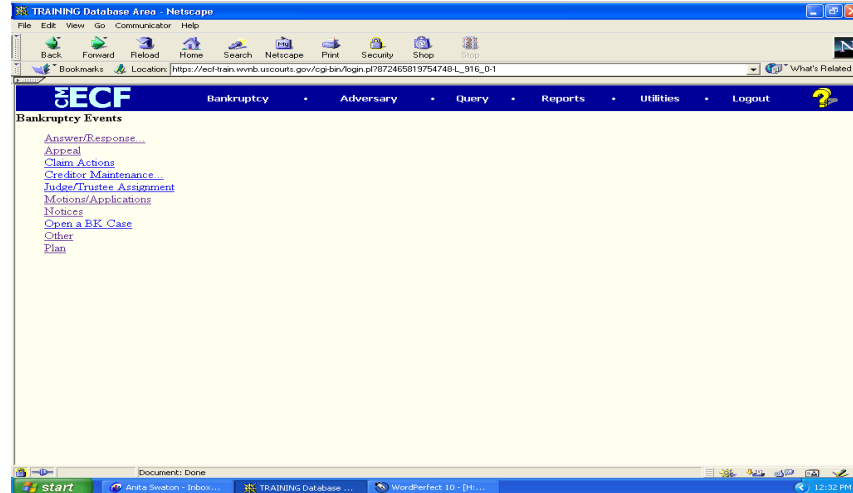


Figure 2

**STEP 3** The **CASE NUMBER** screen displays. (See Figure 3a.)

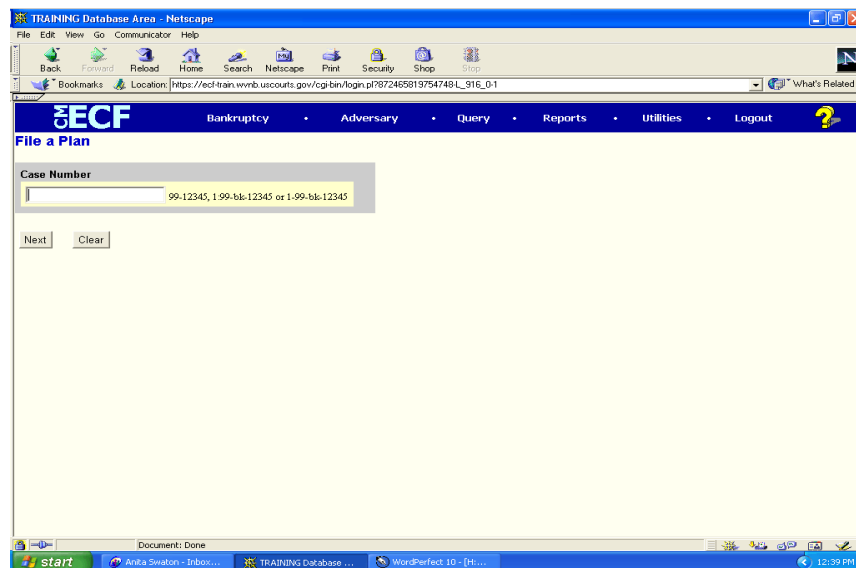


Figure 3a

- ◆ Enter the case number (See Figure 3b.)

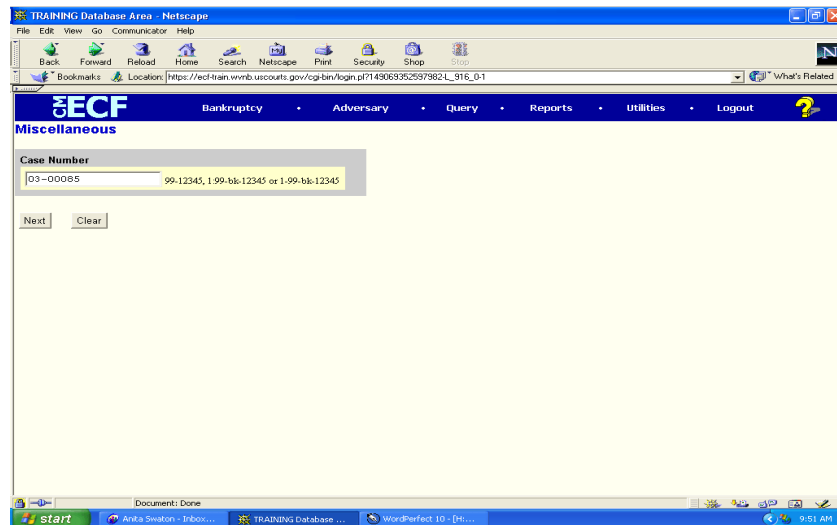


Figure 3b

- ◆ Click **[Next]** to continue.

**STEP 4** The following screen displays. (See Figure 4a.)

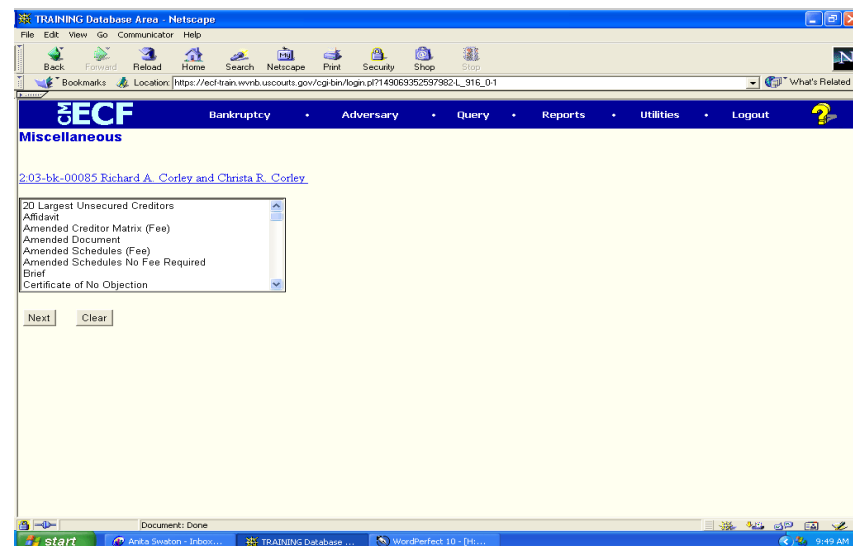


Figure 4a

- ◆ Verify the case number and case name.

- ◆ If the case number and name do not match your document, click the browser **[Back]** button to try again. You may use the browser **[Back]** button at any time during this process to verify former screens until the final submission.
- ◆ Select **Amended Schedules (Fee)** OR **Amended Schedules No Fee Required** OR **Amended Creditor Matrix (Fee)**.

NOTE: If you are amending **both** schedules to add creditors and the matrix to include these-newly added creditors, do **not** select **Amended Schedules (Fee)** and **Amended Creditor Matrix (Fee)**. If this is the case, **only** select **Amended Schedules (Fee)**; you will be given the opportunity to include in docket text the **Amended Matrix**.

In this lesson, the debtors' attorney is amending Schedules D, E and F and the mailing matrix to include the newly-added creditors.

Amended Schedules (Fee) is selected. (See Figure 4b.)

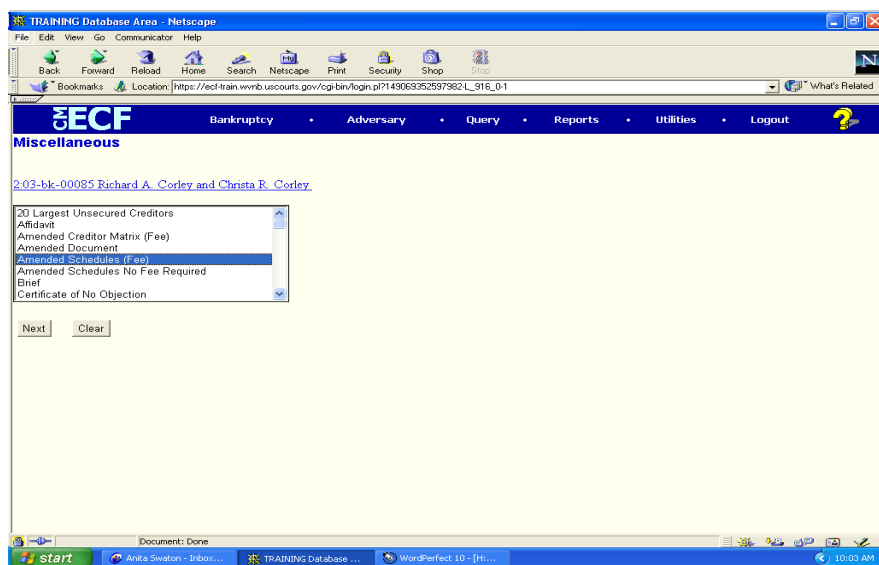


Figure 4b

- ◆ Click **[Next]** to continue.

**STEP 5:** The **Joint Filing With Other Attorneys** screen displays. (See Figure 5.)

- ◆ Click in the **Joint filing with other attorney(s)** box only if this is a joint filing to add any additional attorneys.

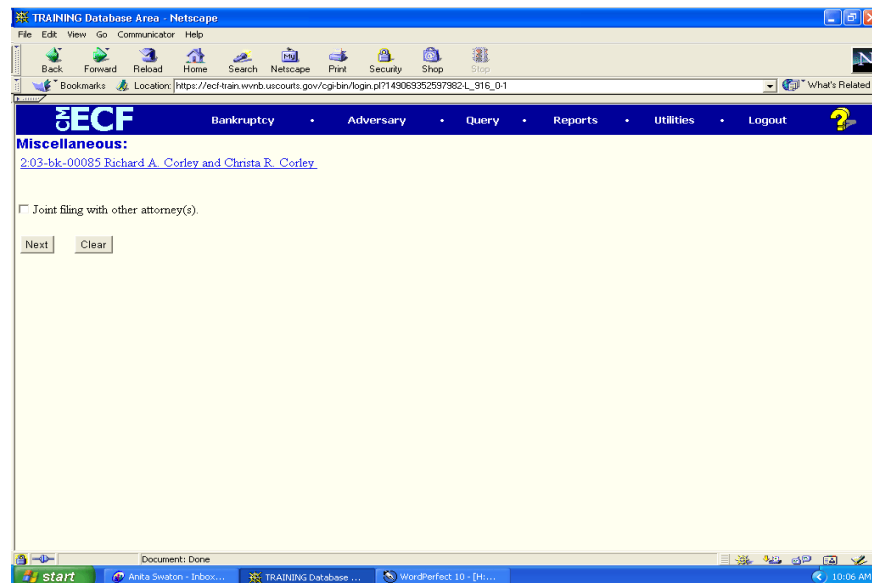


Figure 5

- ◆ Click **[Next]** to continue.

**STEP 6:** The **Select the Party** screen displays. (See Figure 6a.) All participating parties in the case will appear on this list.

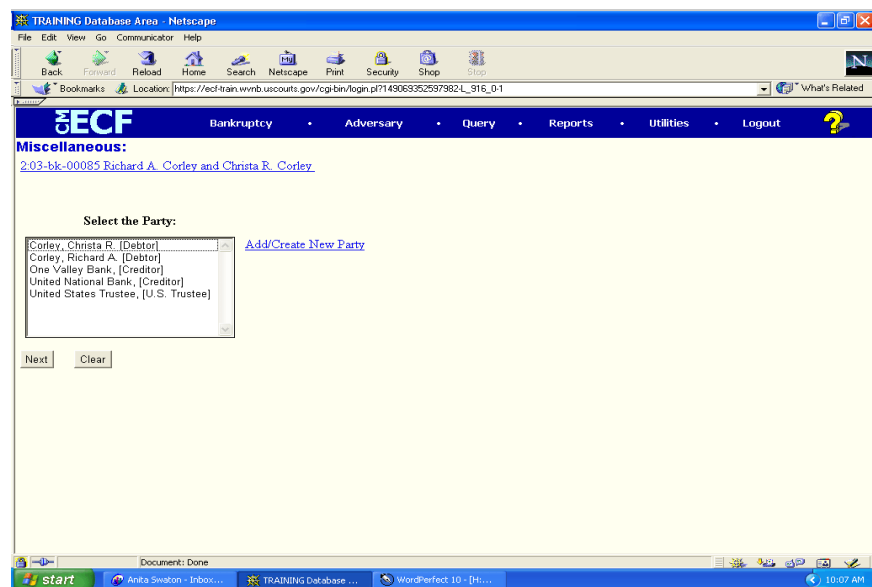


Figure 6a

- ◆ Click to highlight the name of the debtor(s). If the petition is a joint petition, after selecting one of the debtors, hold down the **Ctrl** key to select the joint debtor. (See Figure 6b.)

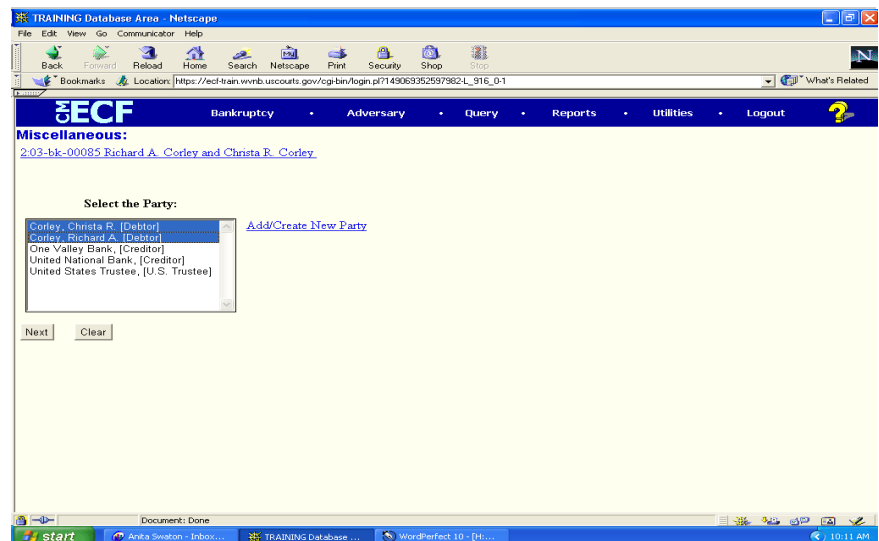


Figure 6b

- ◆ Click **[Next]** to continue.

**STEP 7:** The **PDF DOCUMENT SELECTION** screen displays. (See Figure 7a.)

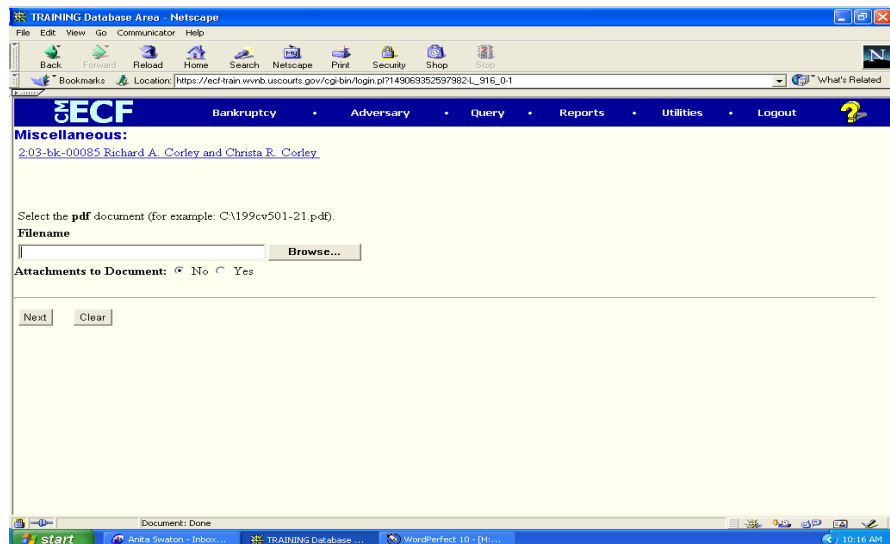


Figure 7a

- ◆ To associate the imaged document with this entry, select the PDF filename of the objection you are filing.
  - Click **[Browse]**. In the **File Upload** screen change **Files of type:** to **All files(\*.\*)** then navigate to the directory where the appropriate PDF file is located and select it with your mouse.
  - To make certain you are about to associate the correct PDF file for this entry, right click on the filename with your mouse and select **Open**.
  - This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct.
  - Close or minimize the Adobe application and if that is the correct file, click **[Open]** on the File Upload dialogue box.
- ◆ The **PDF DOCUMENT SELECTION** screen appears with the path and PDF document in the **Filename** box. (See Figure 7b.)

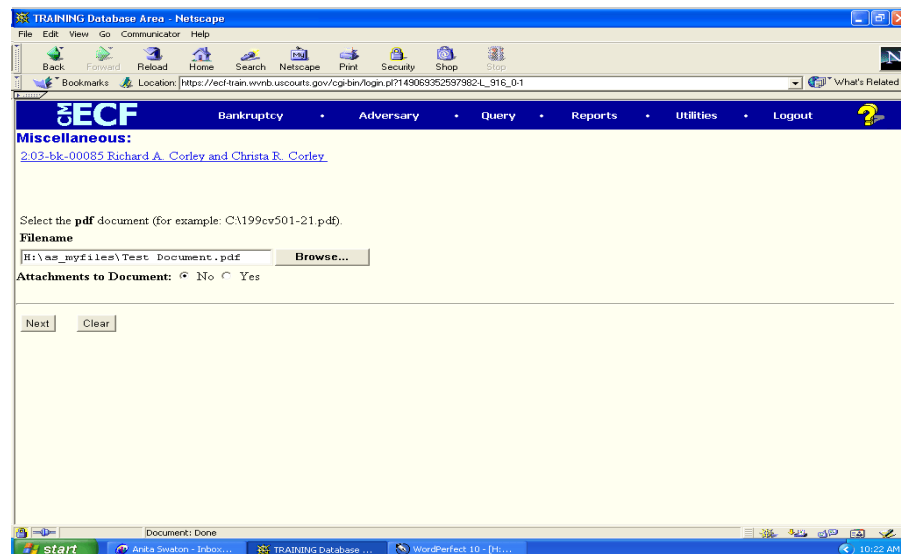


Figure 7b

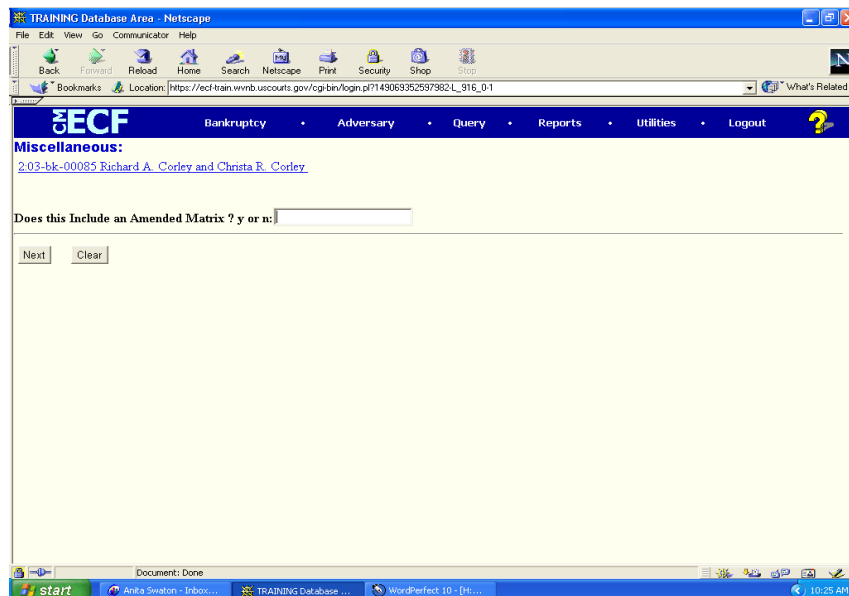
- ◆ The **Attachments to Document** option defaults to **No**. You will have an attachment to this document; click the **Yes** radio button to indicate there are attachments. (Refer to module: *Attaching a*

*PDF File for Filing (Proposed Orders, Exhibits) for more information.)*

NOTE: As in this lesson, if you are **adding** creditors, you must include an attachment captioned **Newly-Added Creditors** which details the names and addresses of the newly-added creditors. If you are **modifying** creditors already listed, you must include an attachment captioned **Modified Creditors** which details the names and addresses of the modified creditors.

- ◆ Click **[Next]** to continue.

**STEP 8:** The following screen appears. (See Figure 8a.)



**Figure 8a**

- ◆ Enter **y** or **n**. In this lesson the debtors' attorney is filing an Amended Matrix along with Amended Schedules. (See Figure 8b.)

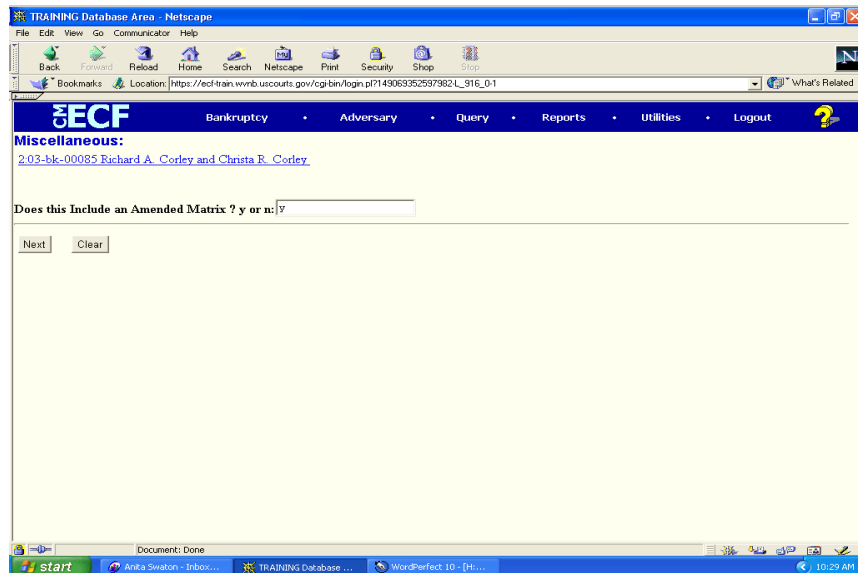


Figure 8b

- ◆ Click **[Next]** to continue.

**STEP 9** The following screen appears. (See Figure 9a.)

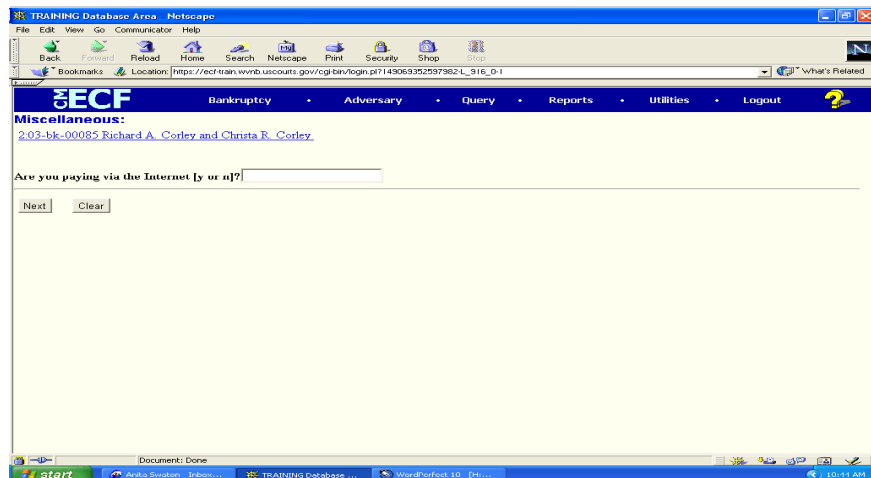
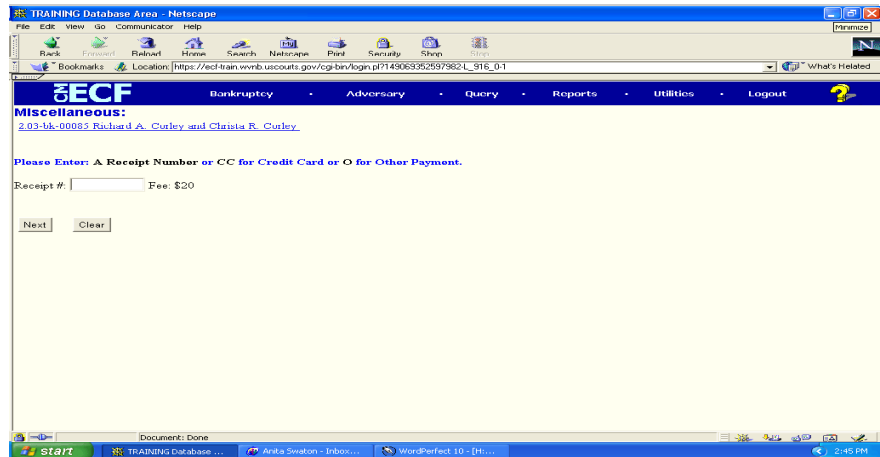


Figure 9a

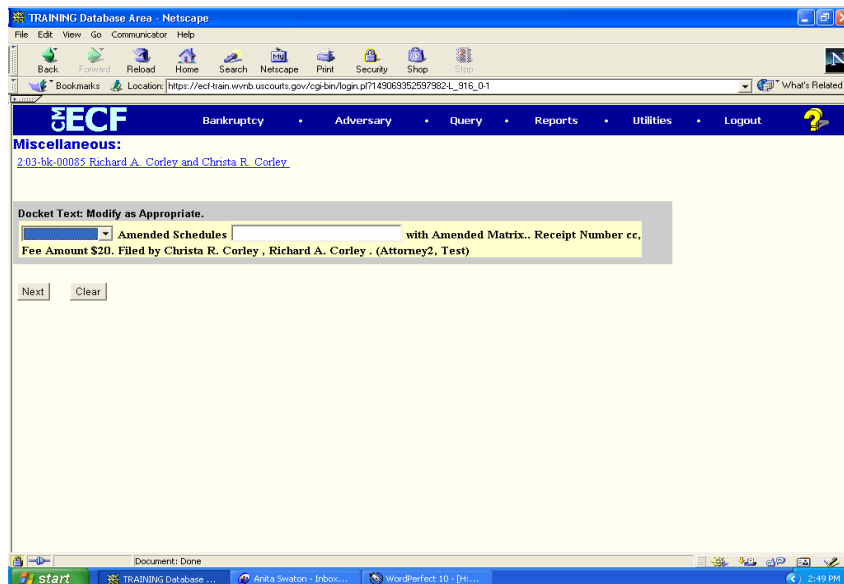
- ◆ Enter **n**.
- ◆ Click **[Next]** to continue.

**STEP 10**      The **Receipt #** screen displays. (See Figure 10.)

The screenshot shows a Netscape browser window titled "TRAINING Database Area - NetScape". The address bar displays the URL: [https://ecf-train.wvmb.uscourts.gov/cgi-bin/login.pl?14306335257982L\\_916\\_01](https://ecf-train.wvmb.uscourts.gov/cgi-bin/login.pl?14306335257982L_916_01). The page header includes the ECF logo and navigation links: Bankruptcy, Adversary, Query, Reports, Utilities, and Logout. Below the header, the text "Miscellaneous:" is followed by a link: [2:03-bk-00083 Richard A. Corley and Christa R. Corley](#). The main content area contains the instruction: "Please Enter: A Receipt Number or CC for Credit Card or O for Other Payment." Below this, there is a "Receipt #:" label followed by a text input field and a "Fee: \$20" label. At the bottom of the form are "Next" and "Clear" buttons. The browser's status bar at the bottom shows "Document: Done" and the system clock indicates 2:45 PM.

**Figure 10**

- ◆ Enter **CC** for credit card.
- ◆ Click **[Next]** to continue.

**STEP 11:**      The **Docket Text: Modify as Appropriate** screen will display. This screen will allow additional text to be added if applicable. (See Figure 11a.)

The screenshot shows the same Netscape browser window as Figure 10, but the page content has changed. The "Miscellaneous:" section still shows the link for [2:03-bk-00085 Richard A. Corley and Christa R. Corley](#). The main content area now displays the instruction: "Docket Text: Modify as Appropriate." Below this, there is a dropdown menu with "Amended Schedules" selected, followed by the text "with Amended Matrix.. Receipt Number cc, Fee Amount \$20. Filed by Christa R. Corley , Richard A. Corley . (Attorney2, Test)". At the bottom of the form are "Next" and "Clear" buttons. The browser's status bar at the bottom shows "Document: Done" and the system clock indicates 2:49 PM.

**Figure 11a**

- ◆ Insert in docket text the Schedules being amended. In this lesson the debtors' attorney is amending Schedules D, E and F as well as the Matrix. (See Figure 11b.)

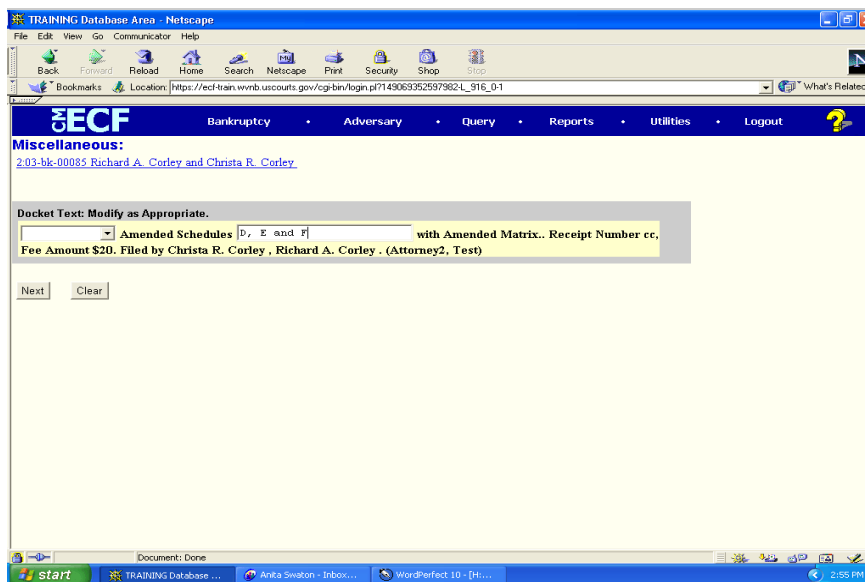


Figure 11b

- ◆ Click [Next] to continue.

**STEP 12:** The **FINAL DOCKET TEXT** screen appears. (See Figure 12.)

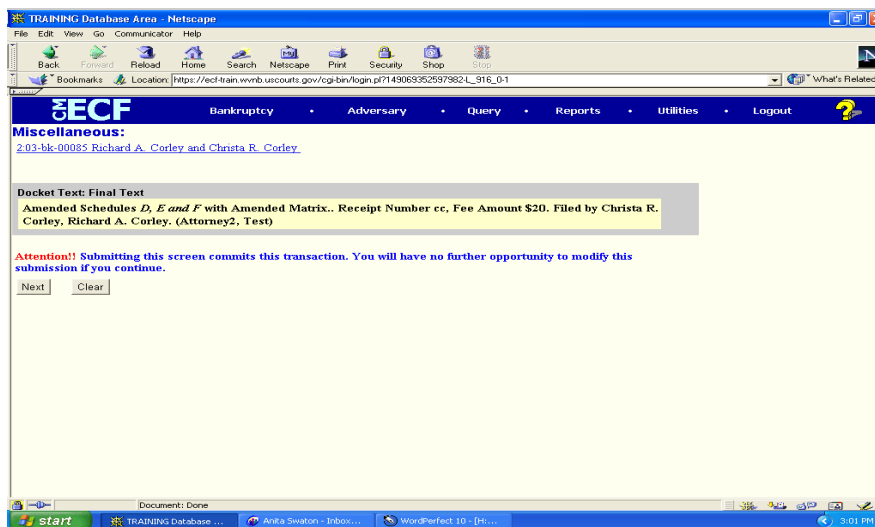


Figure 12

- ◆ Proof this screen carefully! No further editing in the case opening process is allowed after this screen. If Docket Text is correct, click **[Next]**.
- ◆ If any part of it is incorrect, click the browser **[Back]** button to return to the screen you need to correct. Then process the screens again with the respective **[Next]** or **[Submit]** buttons.

**NOTE:** To abort or restart the transaction at any time up until the final docket text screen, click the **Bankruptcy** hyperlink on the **Menu Bar**.

**STEP 13** The **NOTICE OF ELECTRONIC FILING** screen appears.

- ◆ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that this is now an official court document. **(See Figure 13.)**
- ◆ The case number is a hyperlink to the docket sheet and the document number is a hyperlink to the PDF document image.
- ◆ To print a copy of this notice, click the browser **[Print]** icon.
- ◆ To save a copy of this notice, click **[File]** on the browser menu bar and select **Save Frame As**.
- ◆ Further access to the **Notice of Electronic Filing** is available through the electronic docket report. When this option is selected, a bullet appears next to the document number of the event on the docket report. Clicking on this bullet will display a copy of this notice.
- ◆ When a copy of the **Notice of Electronic Filing** is mailed to each subscriber on the case, the following message will display at the top:

**\*\*\*NOTE TO PUBLIC ACCESS USERS\*\*\***

**You may view the filed documents once without charge. To avoid later charges, download a copy of each document during this first viewing.**

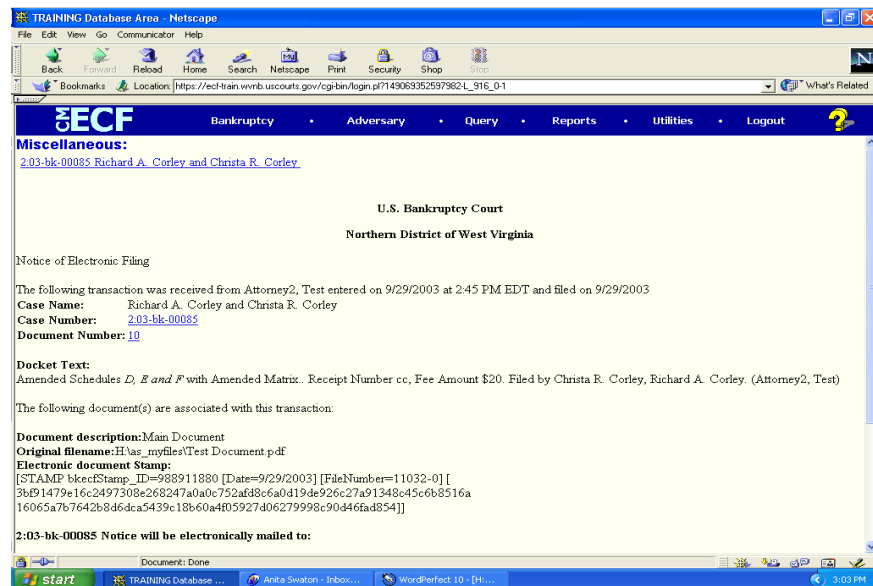


Figure 13

**STEP 14** If you **added** new creditors, please refer to **Uploading a Creditor Matrix** in Section 4 of this training manual to upload the newly-added creditors.

If you **modified** existing creditors, the Court will modify the matrix.

# PLANS

In CM/ECF, plans are docketed as separate events even if filed simultaneously with a voluntary petition as is often the case in chapter 13 filings. This module specifically details how to docket a chapter 13 plan; the same steps would be followed to file a chapter 11 or chapter 12 plan.

**Note:** Chapter 11 disclosure statement is also docketed through the Plan category.

## Chapter 13 Plan

**STEP 1** Click the Bankruptcy hyperlink on the CM/ECF Main Menu Bar. (See Figure 1.)



Figure 1

**STEP 2** The **BANKRUPTCY EVENTS** screen displays. (See Figure 2.)

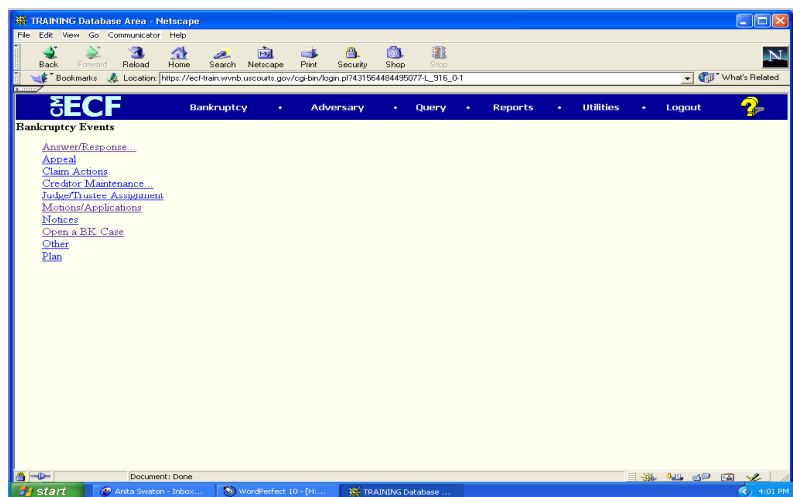


Figure 2

◆ Click the Plan hypertext link.

**STEP 3** The **Case Number** screen displays. (See Figure 3.)

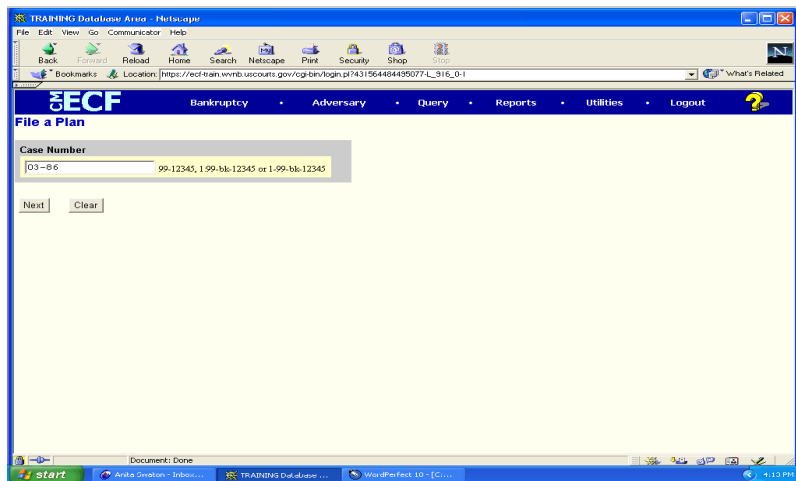


Figure 3

- ◆ Enter the case number in yy-nnnnn format.
- ◆ Click **[Next]** to continue.

**STEP 4** The **Document Selection** screen displays (See Figure 4a.)

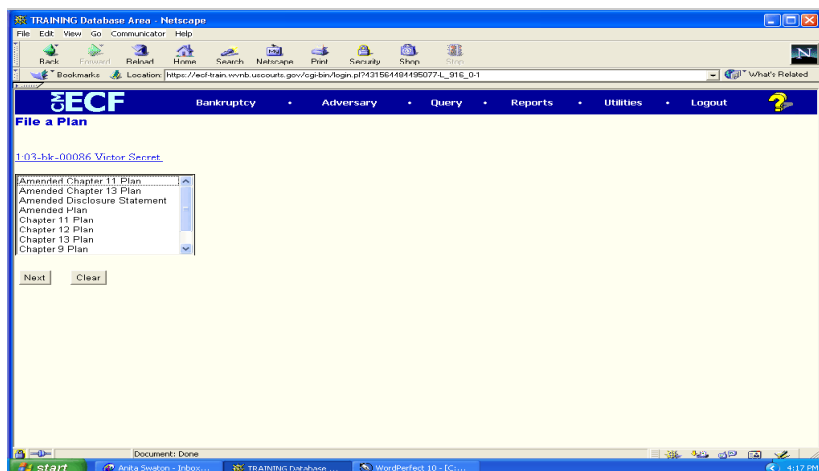


Figure 4a

- ◆ Verify the case number and case name.
- ◆ If the case number and name do not match your document, click the browser **[Back]** button to try again. You may use the browser **[Back]** button at any time during this process to verify former screens until the final submission

- ◆ Use the down arrow to the right of the box to scroll through the Event Type list to select the document to be filed. Click to highlight **Chapter 13 Plan**. (See Figure 4b.)

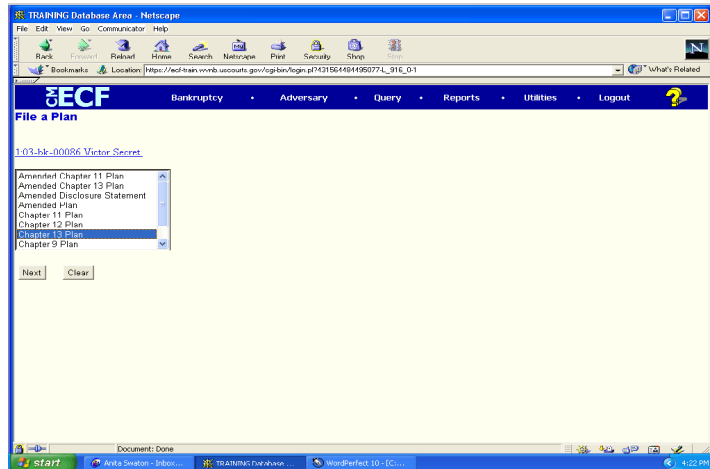


Figure 4b

- ◆ Click **[Next]** to continue.

**STEP 5** If you are not filing the plan jointly with other attorneys, do not select this screen. (See Figure 5.)

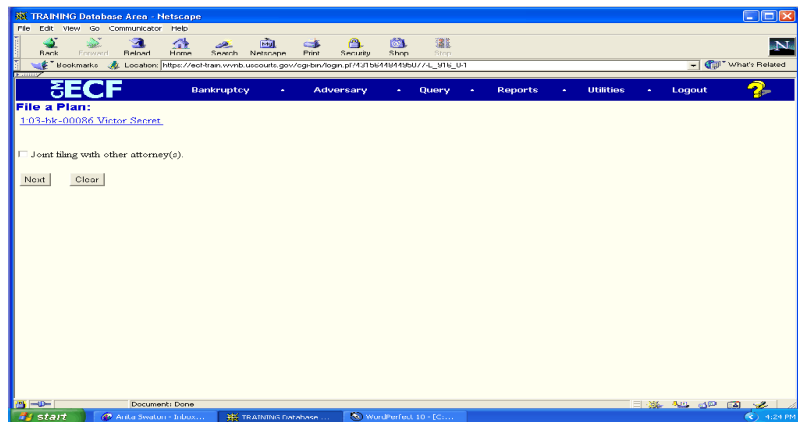


Figure 5

- ◆ Click **[Next]** to continue.

**STEP 6** The Select the Party: Screen appears.

- ◆ Select debtor. (See Figure 6.)

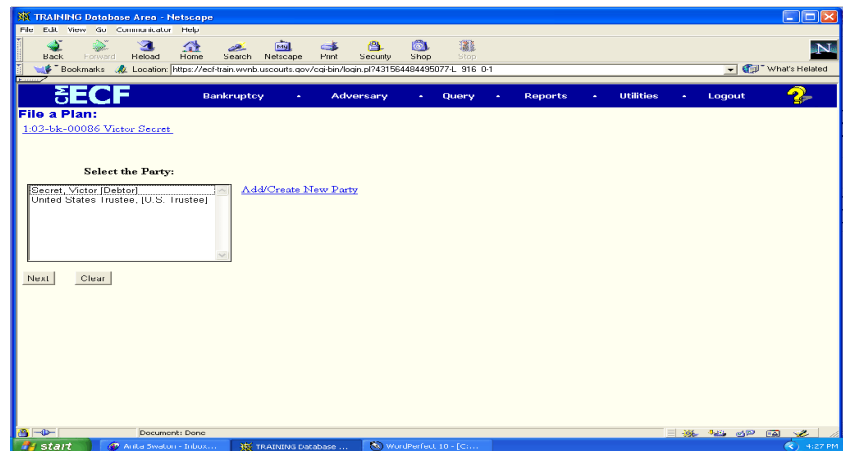


Figure 6

- ◆ Click **[Next]** to continue.

**STEP 7** The **DOCUMENT TYPE SELECTION** screen displays.  
(See Figure 7a.)

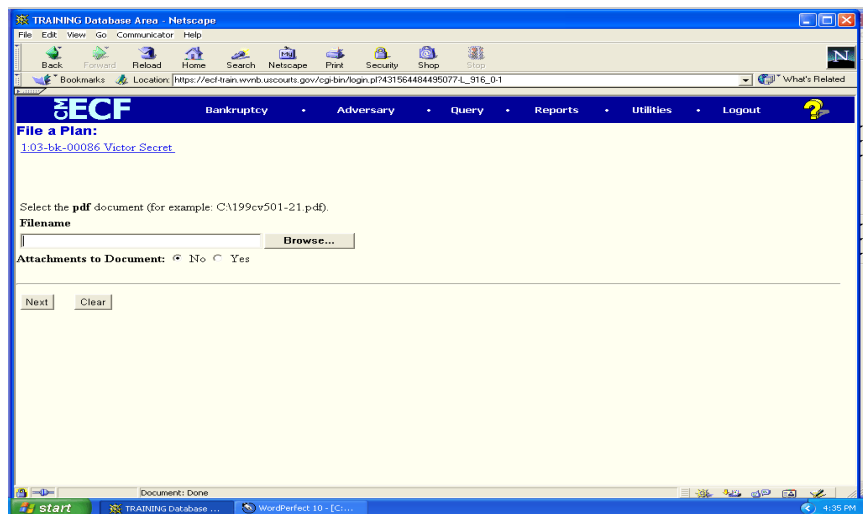


Figure 7a

- ◆ Click **[Browse]**, then navigate to the directory where the appropriate PDF file is located. Double-click the PDF file to select it.
- ◆ In the **File Upload** screen, change **Files of type:** to **All Files(\*.\*)**.

**NOTE:** If you wish to view the image before selecting to be sure

can  
when

you have chosen the correct file, before double-clicking, first right click on the highlighted filename and click on **open**. You view the image in Adobe Acrobat, then close Adobe Acrobat you have finished viewing the image.

- ◆ The **Attachments to Document** option defaults to **No**. If you have attachments to this document, click the **Yes** radio button to indicate there are attachments. (Refer to module: *Attachments to Documents* for more information.)

(See Figure 7b.)

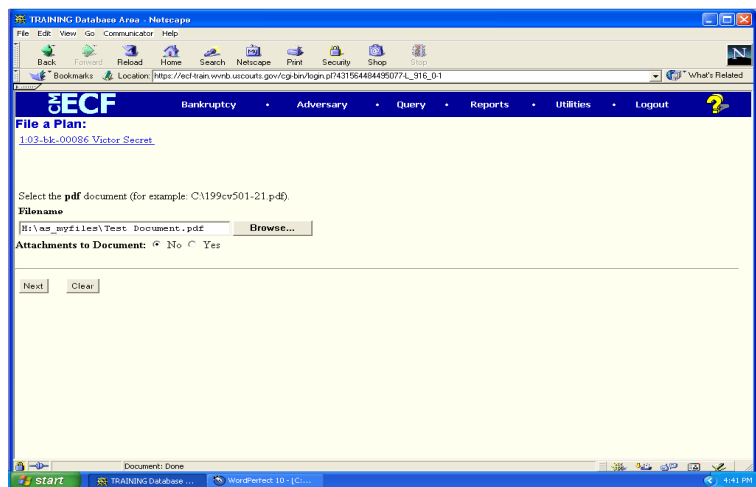


Figure 7b

- ◆ Click **[Next]** to continue.

**STEP 8** The Docket Text: Modify as Appropriate screen displays. (See Figure 8.)

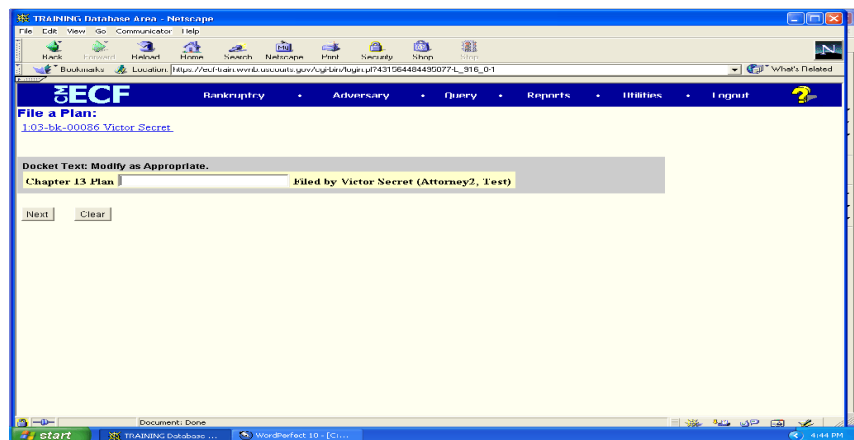


Figure 8

- ◆ Verify the accuracy of the Docket Text.
- ◆ You may enter additional text in the white box if necessary.
- ◆ Click **[Next]** to continue.

**STEP 9** The **Final Approval** screen displays. (See Figure 9.)

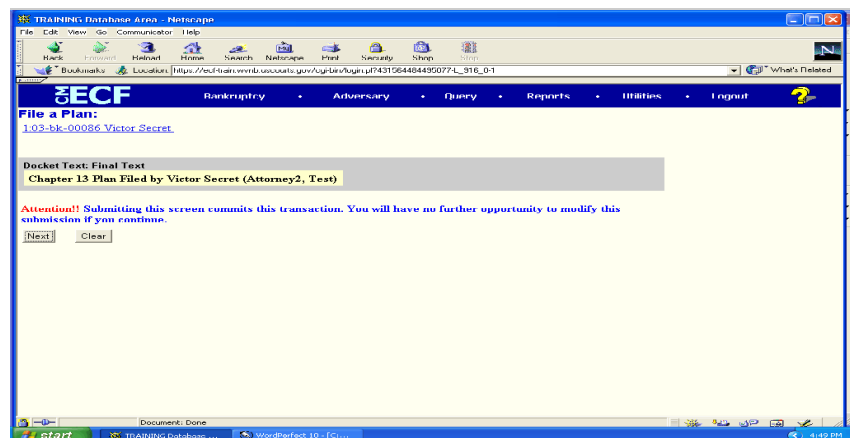
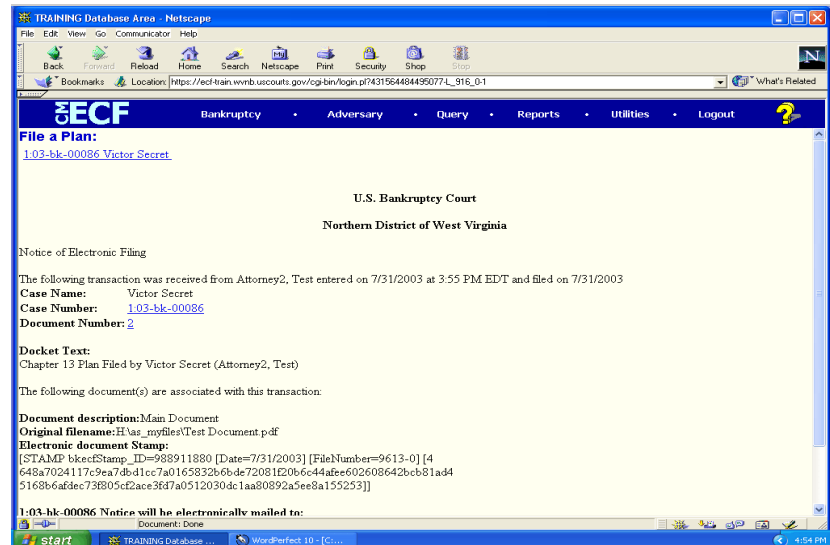


Figure 9

- ◆ Verify the Final Docket Text. Read the warning message.
- ◆ If the Final Docket Text is **correct**:

- ◆ Click **[Next]** to continue and officially submit the document.
- ◆ If the Final Docket Text is **incorrect**:
  - ◆ Click the browser **[Back]** button to find the error(s) and then proceed with the event.
  - ◆ To abort or restart the transaction, return to **Step 1** and begin again.

**STEP 10** The **NOTICE OF ELECTRONIC FILING** screen appears. (See Figure 10.)



**Figure 10**

- ◆ The Notice of Electronic Filing is the verification that the filing has been filed electronically in the court's database. It certifies that the document is now an official court document.
- ◆ Clicking on the case number hypertext link on the **Notice of Electronic Filing** will present the *Docket Report* for this case.

- ◆ Clicking on the document number hypertext link will present the *PDF Image* of the document just filed.
- ◆ To print a copy of this notice click the browser **[Print]** icon.
- ◆ To save a copy of this notice, click **[File]** on the browser menu bar and select **Save Frame As**.
- ◆ You may also save the notice through the browser **File/Save** option.

# Objection to Confirmation of Plan

This process shows the steps and screens required for attorneys to file an Objection to Confirmation of a Plan.

**STEP 1** Click the Bankruptcy hyperlink on the CM/ECF main menu bar. (See Figure 1.)



Figure 1

**STEP 2** Click on the Plan hyperlink displayed on the **BANKRUPTCY EVENTS** screen. (See Figure 2.)

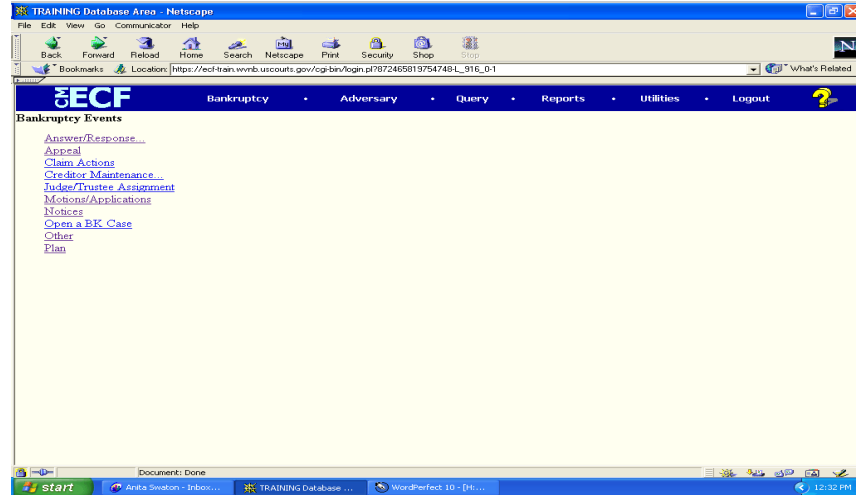


Figure 2

**STEP 3** The **CASE NUMBER** screen displays. (See Figure 3a.)

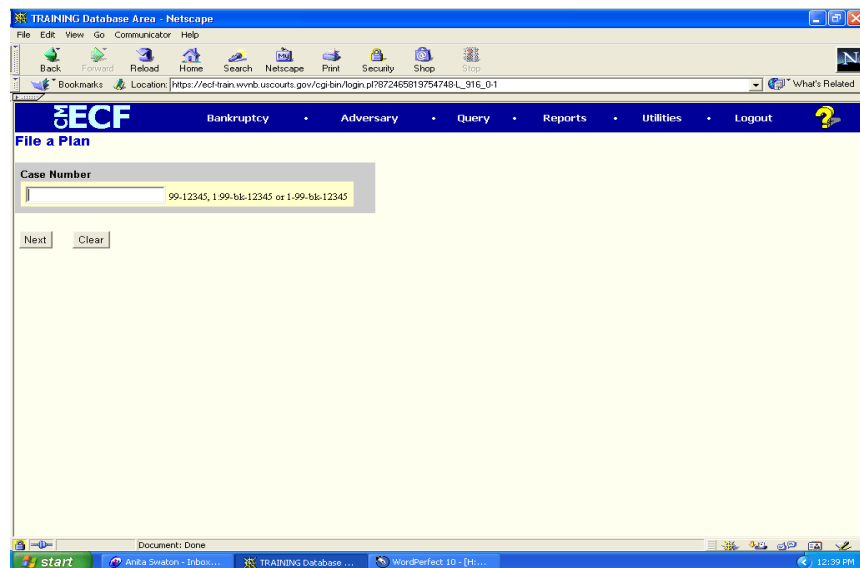


Figure 3a

- ◆ Enter the case number (See Figure 3b.)

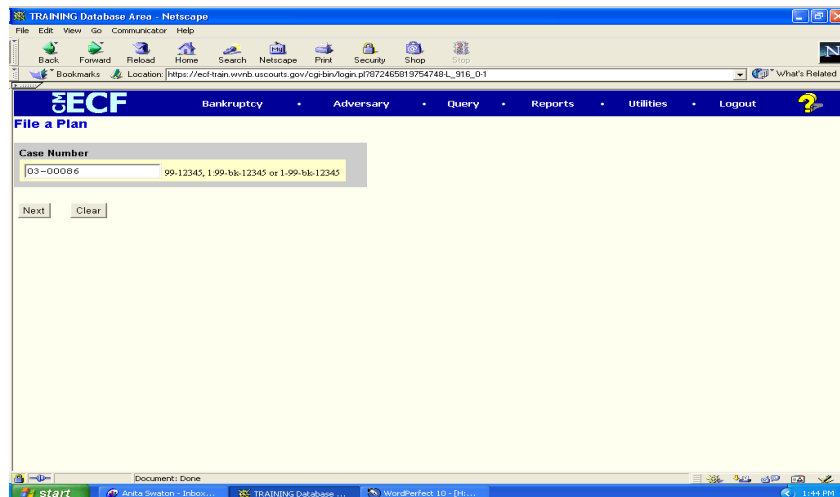


Figure 3b

- ◆ Click **[Next]** to continue.

**STEP 4**

The following screen displays. (See Figure 4a.)

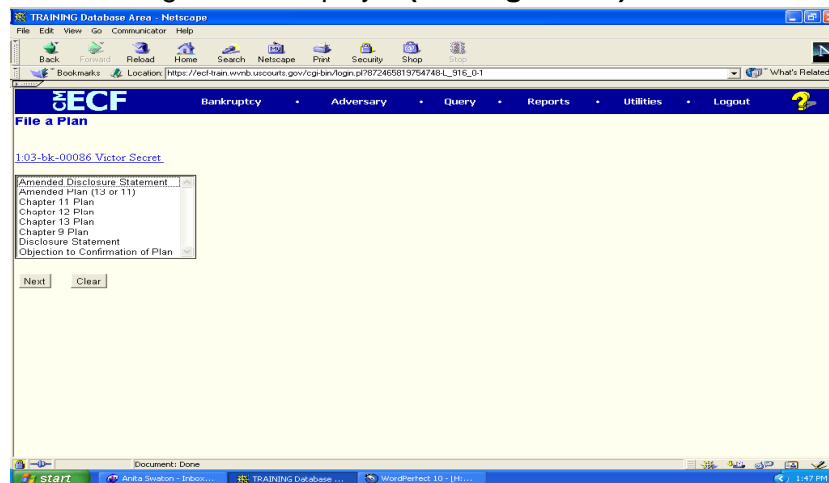


Figure 4a

- ◆ Select **Objection to Confirmation of Plan**. (See Figure 4b.)

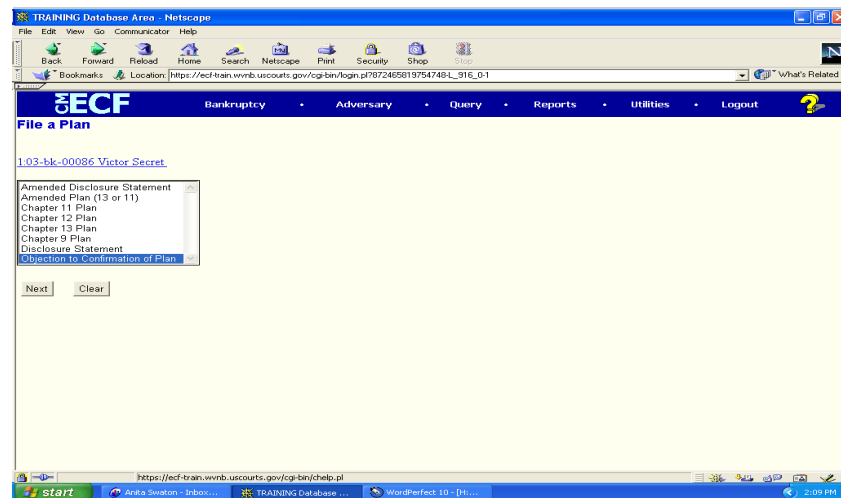


Figure 4b

- ◆ Click **[Next]** to continue.

**STEP 5:** The **Joint Filing With Other Attorneys** screen displays. (See Figure 5.)

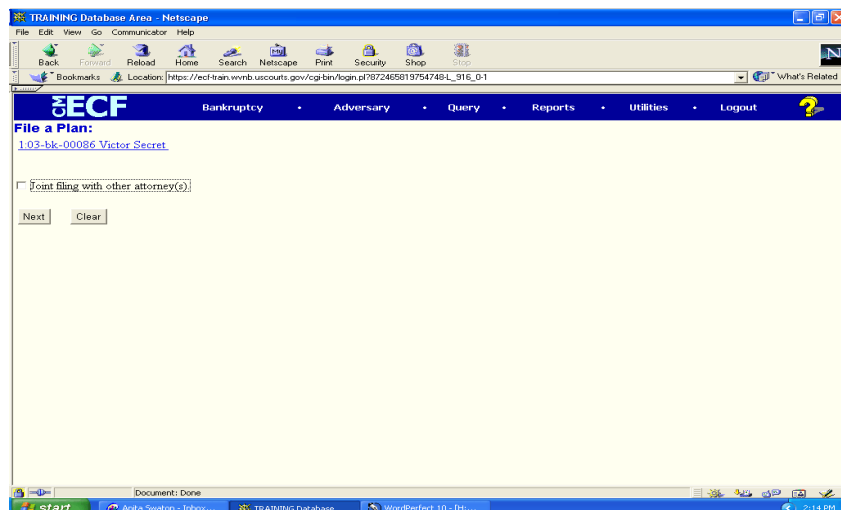
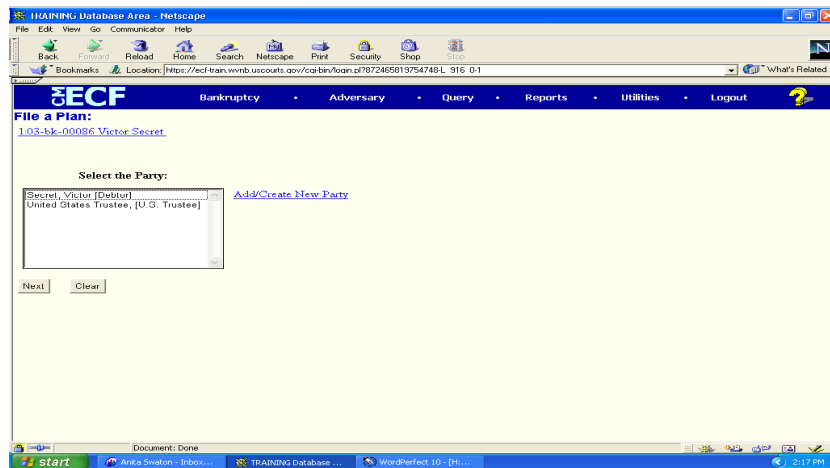


Figure 5

- ◆ Click in the **Joint filing with other attorney(s)** box only if this is a joint filing to add any additional attorneys.
- ◆ Click **[Next]** to continue.

- STEP 6:** The **Select the Party** screen displays. (See Figure 6a.) All participating parties in the case will appear on this list.

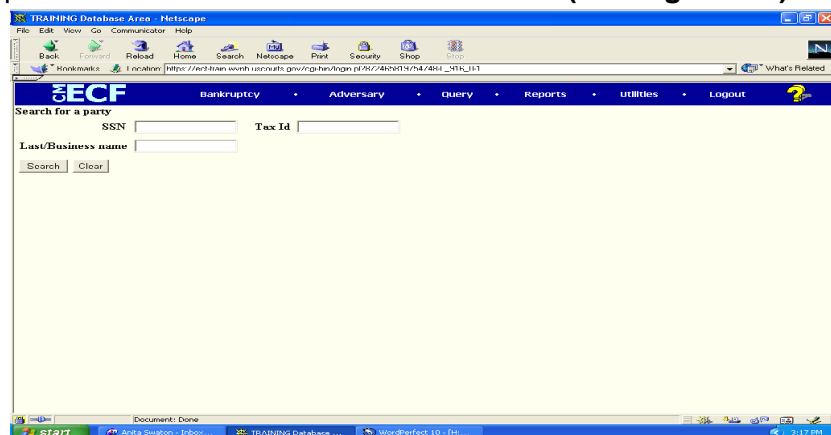


**Figure 6a**

- ◆ Click to highlight the name of the party filing the objection if the party appears.
- ◆ Click **[Next]** to continue.

**OR**

- ◆ Select **Add/Create New Party** if the party you represent does not appear on the **Select the Party** screen.
- ◆ On **Search for a Party** screen, enter the name of the party you represent in the **Last/Business Name** field. (See Figure 6b.)



**Figure 6b**

- ◆ Then click **Search**.
- ◆ Select name from list or Create new party. (See Figure 6c.)

The screenshot shows the ECF TRAINING Database Area in Netscape. The search results section displays 'North American Capital Corporation' in a list. Below the list are two buttons: 'Select name from list' and 'Create new party'.

Figure 6c

- ◆ Enter party if applicable and address of party.
- ◆ Select role such as **creditor** or **interested party**. (See Figure 6d.)

The screenshot shows the 'Party Information' form for 'North American Capital Corporation'. The form includes fields for Office, Address 1, Address 2, Address 3, City, State, Zip, County, Country, Phone, Fax, E-mail, ProSe, and Role. The 'Role' dropdown menu is open, showing a list of roles including 'blank (blank)', 'Claimant (c.pt)', 'Consultant (consult.pr)', 'Counter-Claimant (cc.pt)', 'Counter-Defendant (cd.pt)', 'Cred. Comm. Chair (ccrmch.pt)', 'Creditor Committee (ccrm.pt)', 'Cross Defendant (crd.pt)', 'Cross-Claimant (cc.pt)', 'Debtor (db.pt)', 'Defendant (dt.pt)', 'Examiner (ex.pr)', 'Financial Advisor (fa.pr)', 'Interested Party (intp.pt)', 'Interpleader (i.pt)', 'Intervenor (inv.pt)', 'Intervenor-Defendant (id.pt)', 'Intervenor-Plaintiff (ip.pt)', 'Liquidator (li.pr)', and 'Mediator (md.pr)'. The 'Party text' field is empty, and the 'Submit', 'Cancel', and 'Clear' buttons are at the bottom.

Figure 6c

- ◆ Select **Submit**.
- ◆ Select party you represent on **Select the Party** screen. (See Figure 6d.)

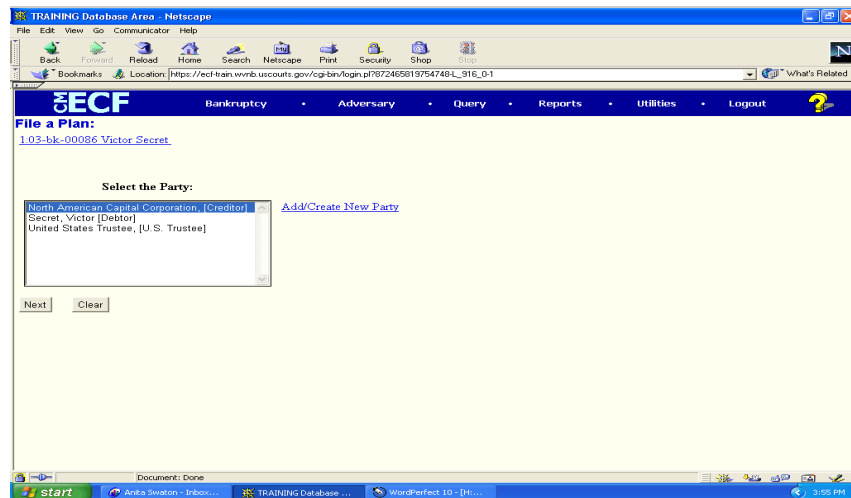
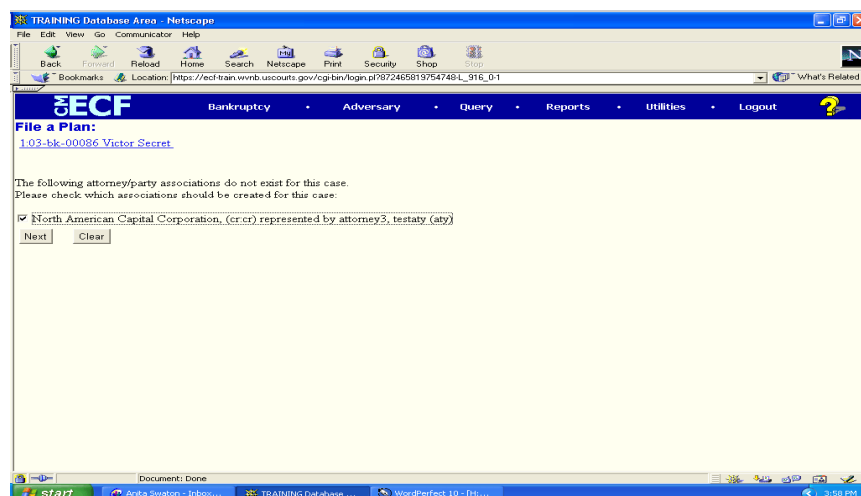


Figure 6d

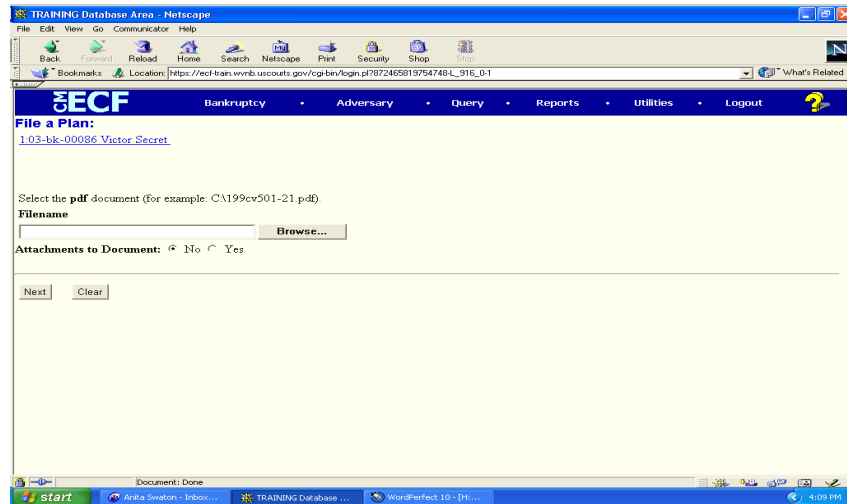
- ◆ Click **[Next]** to continue.
- ◆ Create attorney/party association. (See Figure 6e.)



Page 6e

- ◆ Click **[Next]** to continue.

**STEP 7:** The **PDF DOCUMENT SELECTION** screen displays. (See Figure 7a.)



**Figure 7a**

- ◆ To associate the imaged document with this entry, select the PDF filename of the objection you are filing.
  - Click **[Browse]**. In the **File Upload** screen change **Files of type:** to **All files(\*.\*)** then navigate to the directory where the appropriate PDF file is located and select it with your mouse.
  - To make certain you are about to associate the correct PDF file for this entry, right click on the filename with your mouse and select **Open**.
  - This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct.
  - Close or minimize the Adobe application and if that is the correct file, click **[Open]** on the File Upload dialogue box.

- ◆ The **PDF DOCUMENT SELECTION** screen appears with the path and PDF document in the **Filename** box. (See Figure 7b.)

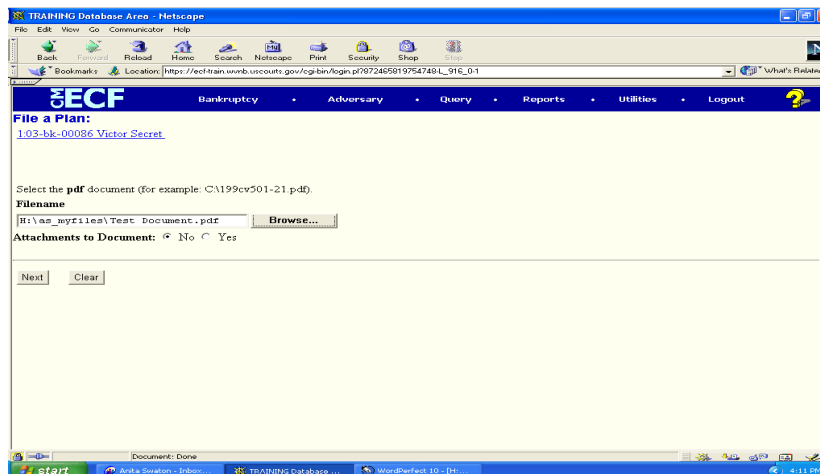


Figure 7b

- ◆ The **Attachments to Document** option defaults to **No**. If you have attachments to this document, click the **Yes** radio button to indicate there are attachments. (Refer to module: *Attachments to Documents* for more information.)
- ◆ Click **[Next]** to continue.

**STEP 8:** The **Select the Appropriate Event(s)** screen will display. (See Figure 8a.)

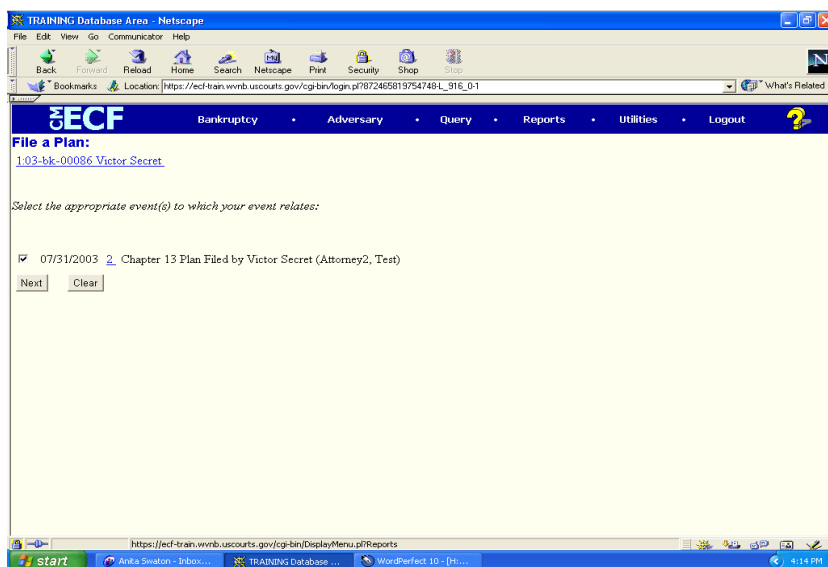


Figure 8a

- ◆ Select the plan to which you are objecting.
- ◆ Click **[Next]** to continue.

**STEP 9:** The **Docket Text: Modify as Appropriate** screen will display. This screen will display a prefix box and a supplemental text box to add more detail to the docket text. **(See Figure 9a.)**

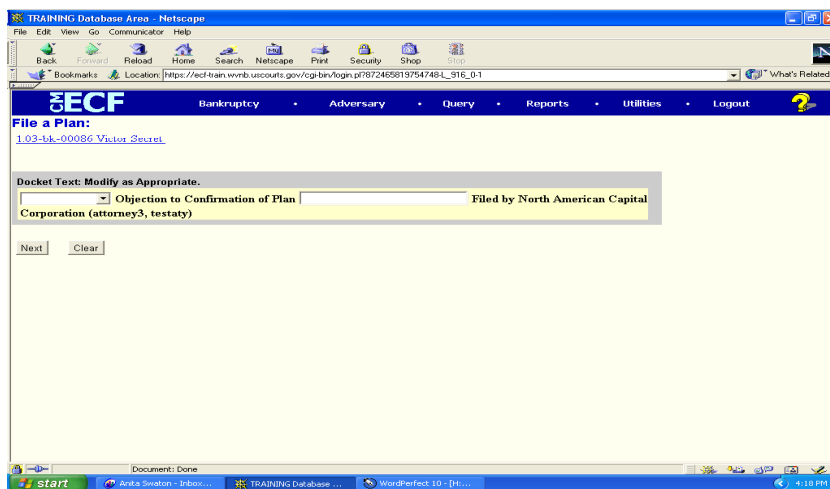
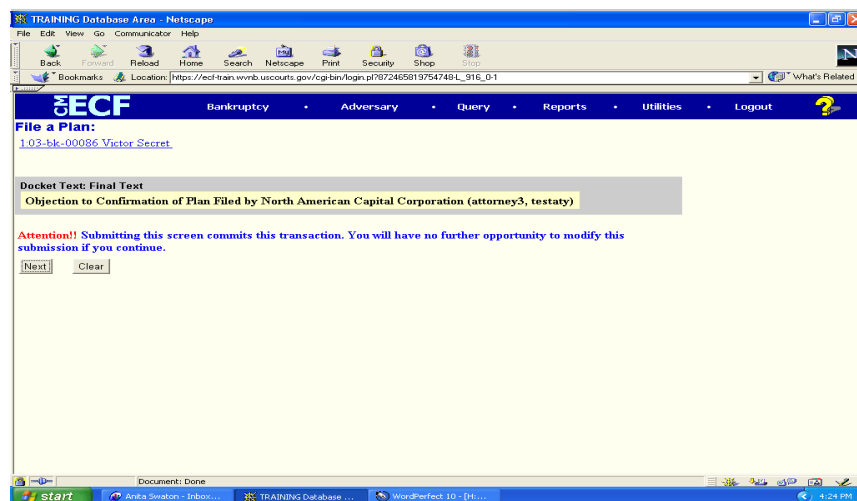


Figure 9a

- ◆ Click the down arrow to display the prefix options. Select a descriptive prefix, if it is appropriate.
- ◆ If necessary, add detail to the final text.
- ◆ Click **[Next]** to continue.

**STEP 10:** The **FINAL DOCKET TEXT** screen appears. (See Figure 10.)



**Figure 10**

- ◆ Proof this screen carefully! No further editing in the case opening process is allowed after this screen. If Docket Text is correct, click **[Next]**.

- ◆ If any part of it is incorrect, click the browser **[Back]** button to return to the screen you need to correct. Then process the screens again with the respective **[Next]** or **[Submit]** buttons.

**NOTE:** To abort or restart the transaction at any time up until the final docket text screen, click the **Bankruptcy** hyperlink on the **Menu Bar**.

**STEP 11** The **NOTICE OF ELECTRONIC FILING** screen appears.

- ◆ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that this is now an official court document. **(See Figure 11.)**
- ◆ The case number is a hyperlink to the docket sheet and the document number is a hyperlink to the PDF document image.
- ◆ To print a copy of this notice, click the browser **[Print]** icon.
- ◆ To save a copy of this notice, click **[File]** on the browser menu bar and select **Save Frame As**.
- ◆ Further access to the **Notice of Electronic Filing** is available through the electronic docket report. When this option is selected, a bullet appears next to the document number of the event on the docket report. Clicking on this bullet will display a copy of this notice.
- ◆ When a copy of the **Notice of Electronic Filing** is mailed to each subscriber on the case, the following message will display at the top:

**\*\*\*NOTE TO PUBLIC ACCESS USERS\*\*\***

**You may view the filed documents once without charge. To avoid later charges, download a copy of each document during this first viewing.**

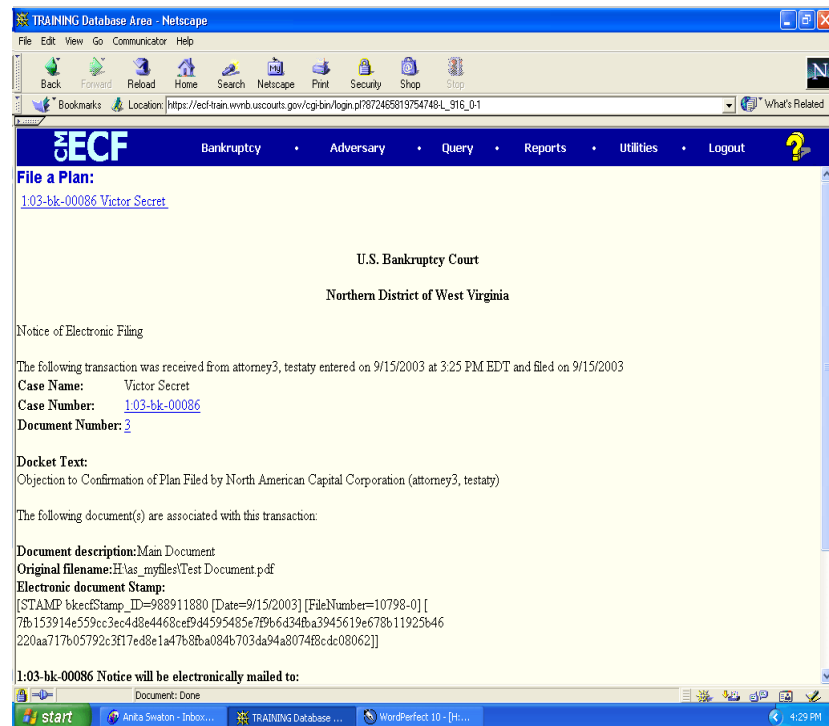
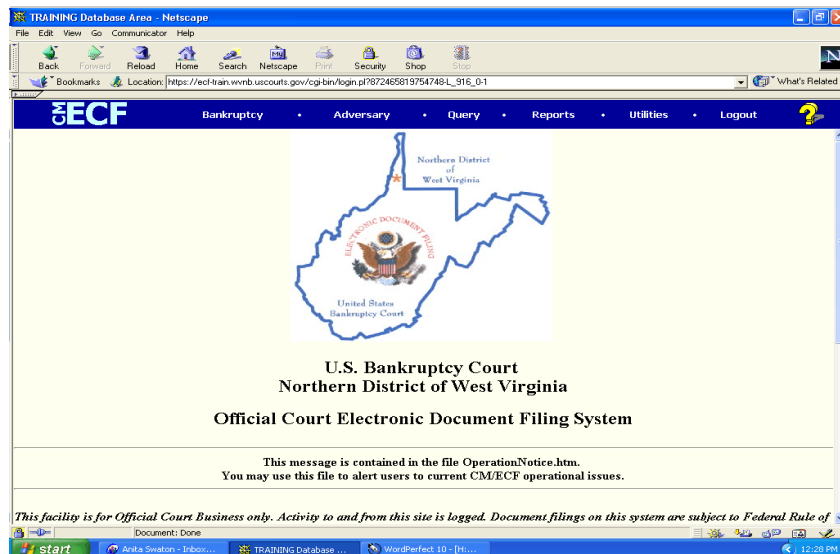


Figure 11

## Amended Plan

This process shows the steps and screens required for attorneys to file an Amended Plan in a Chapter 13 proceeding. The same steps would be followed to file an amended Chapter 11 Plan.

**STEP 1** Click the Bankruptcy hyperlink on the CM/ECF main menu bar. (See Figure 1.)



**Figure 1**

**STEP 2** Click on the Plan hyperlink displayed on the **BANKRUPTCY EVENTS** screen. (See Figure 2.)

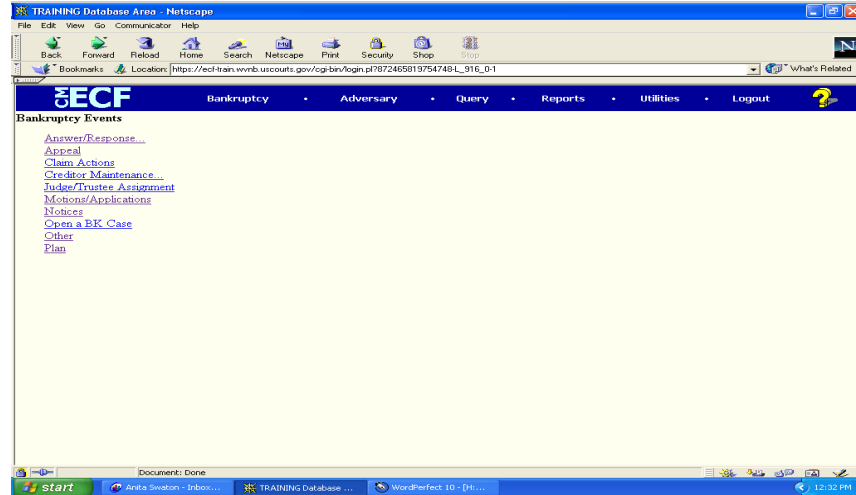


Figure 2

**STEP 3** The **CASE NUMBER** screen displays. (See Figure 3a.)

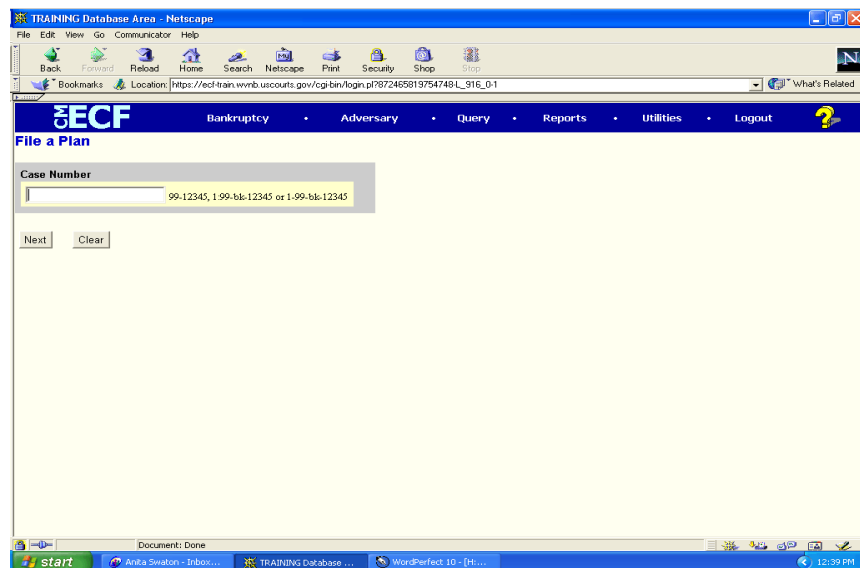


Figure 3a

- ◆ Enter the case number (See Figure 3b.)

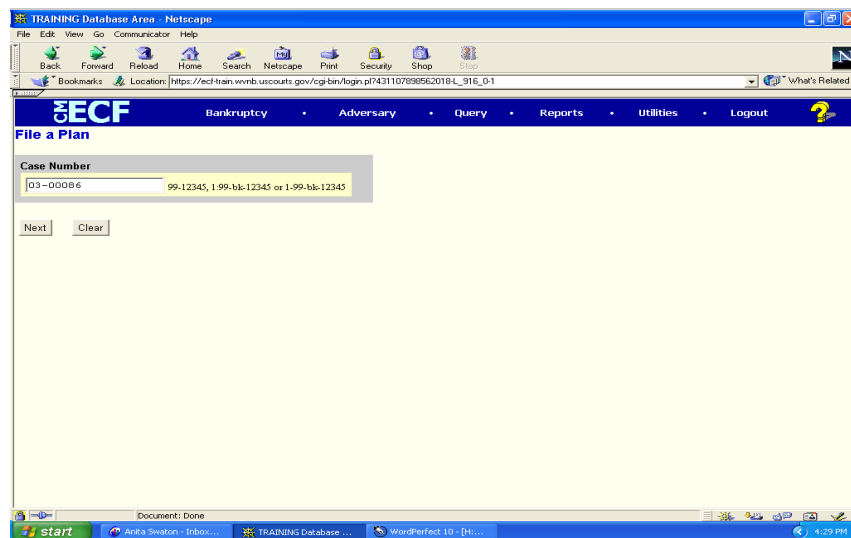


Figure 3b

- ◆ Click **[Next]** to continue.

**STEP 4** The following screen displays. (See Figure 4a.)

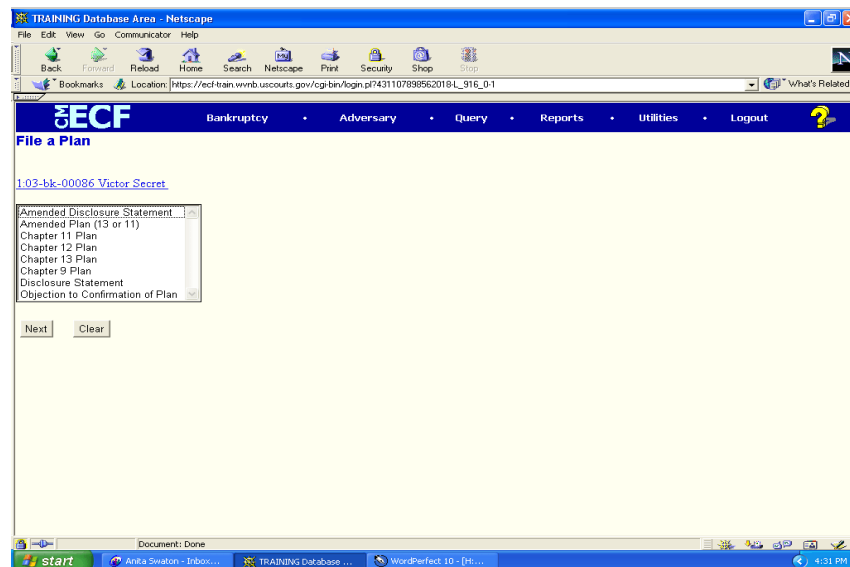


Figure 4a

- ◆ Verify the case number and case name.

- ◆ If the case number and name do not match your document, click the browser **[Back]** button to try again. You may use the browser **[Back]** button at any time during this process to verify former screens until the final submission.
- ◆ Select **Amended Plan (13 or 11)**. (See Figure 4b.)

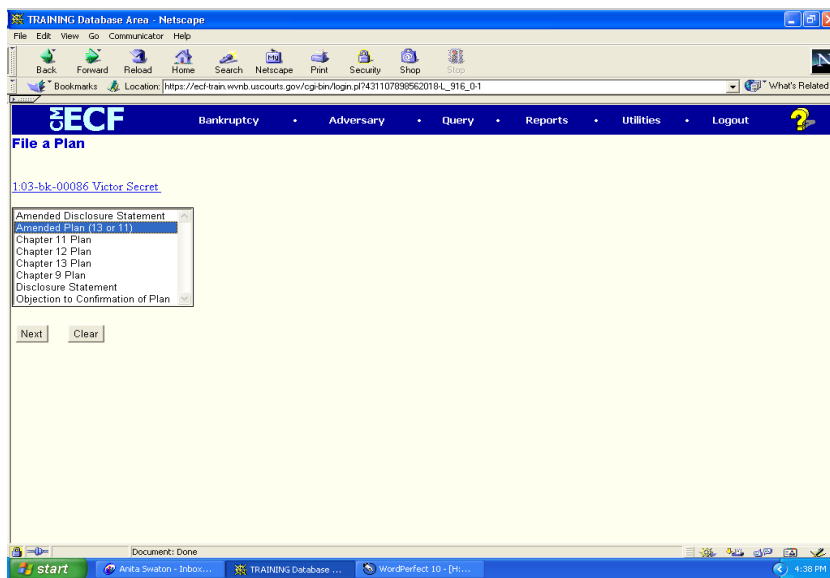


Figure 4b

- ◆ Click **[Next]** to continue.

**STEP 5:** The **Joint Filing With Other Attorneys** screen displays. (See Figure 5.)

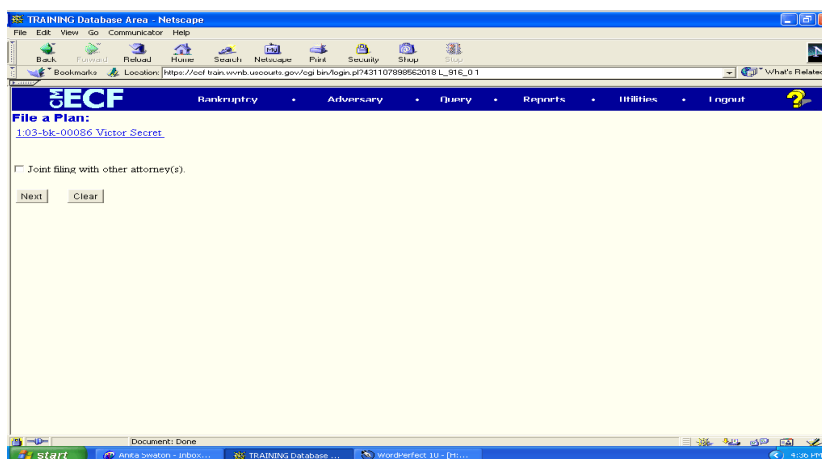
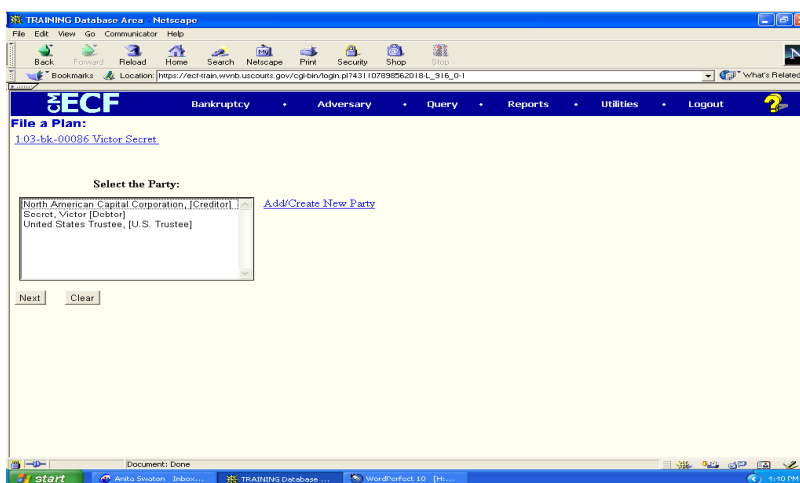


Figure 5

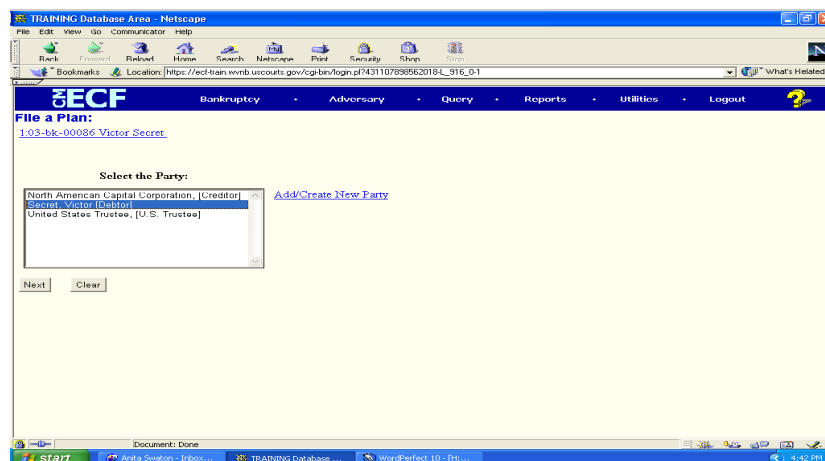
- ◆ Click in the **Joint filing with other attorney(s)** box only if this is a joint filing to add any additional attorneys.
- ◆ Click **[Next]** to continue.

**STEP 6:** The **Select the Party** screen displays. (See Figure 6a.) All participating parties in the case will appear on this list.



**Figure 6a**

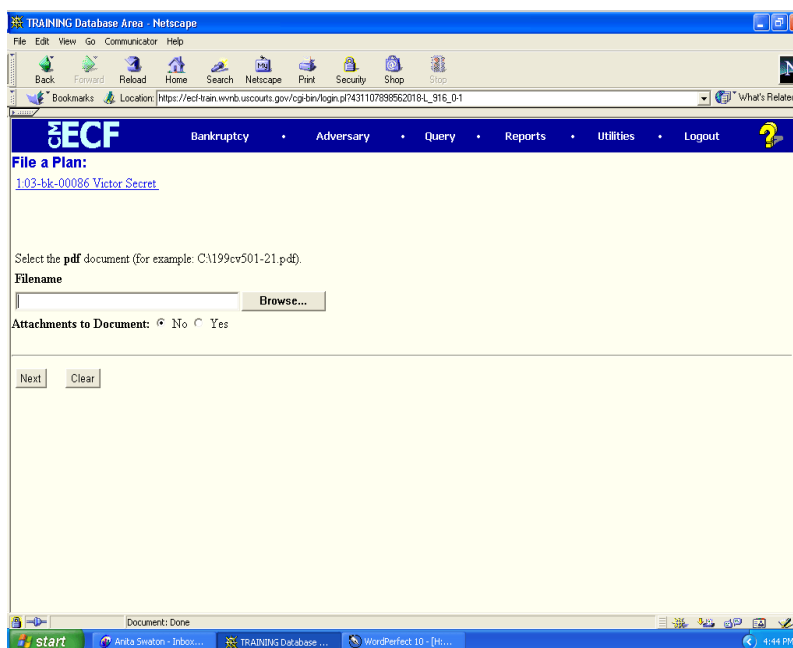
- ◆ Click to highlight the name of the debtor(s). (See Figure 6b.)



**Figure 6b**

- ◆ Click **[Next]** to continue.

**STEP 7:** The **PDF DOCUMENT SELECTION** screen displays. (See Figure 7a.)



**Figure 7a**

- ◆ To associate the imaged document with this entry, select the PDF filename of the objection you are filing.
- Click **[Browse]**. In the **File Upload** screen change **Files of type:** to **All files(\*.\*)** then navigate to the directory where the appropriate PDF file is located and select it with your mouse.
- To make certain you are about to associate the correct PDF file for this entry, right click on the filename with your mouse and select **Open**.
- This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct.
- Close or minimize the Adobe application and if that is the correct file, click **[Open]** on the File Upload dialogue box.

- ◆ The **PDF DOCUMENT SELECTION** screen appears with the path and PDF document in the **Filename** box. (See Figure 7b.)

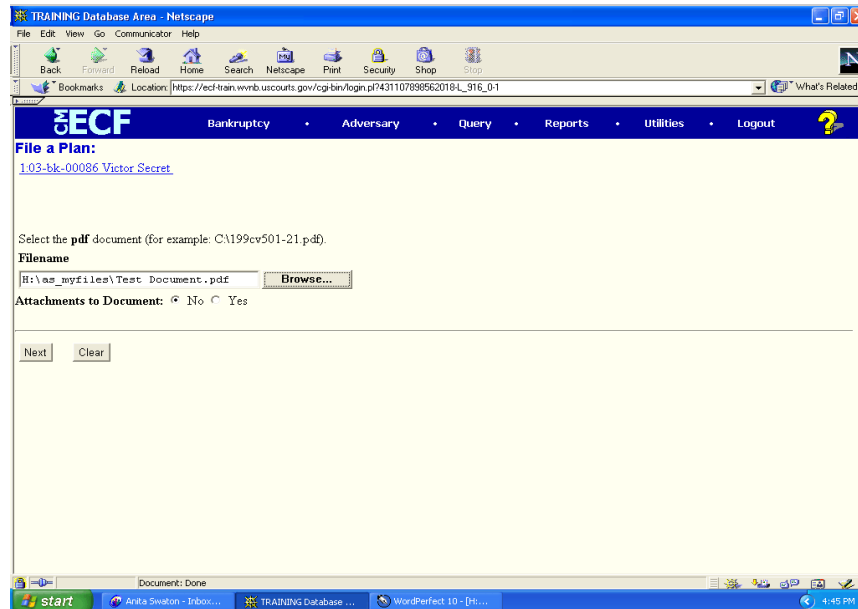


Figure 7b

- ◆ The **Attachments to Document** option defaults to **No**. If you have attachments to this document, click the **Yes** radio button to indicate there are attachments. (Refer to module: *Attachments to Documents* for more information.)
- ◆ Click **[Next]** to continue.

**STEP 8:** The following screen appears. (See Figure 8a.)

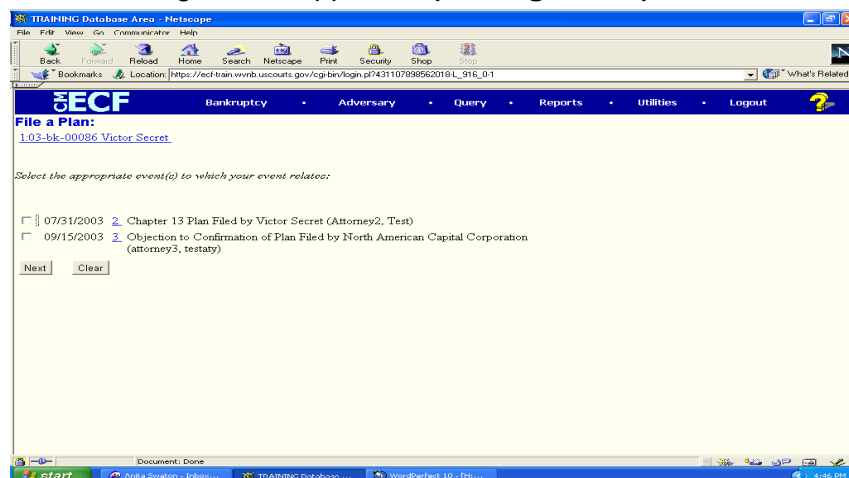


Figure 8a

- ◆ Select the Chapter 13 Plan. (See Figure 8b.)

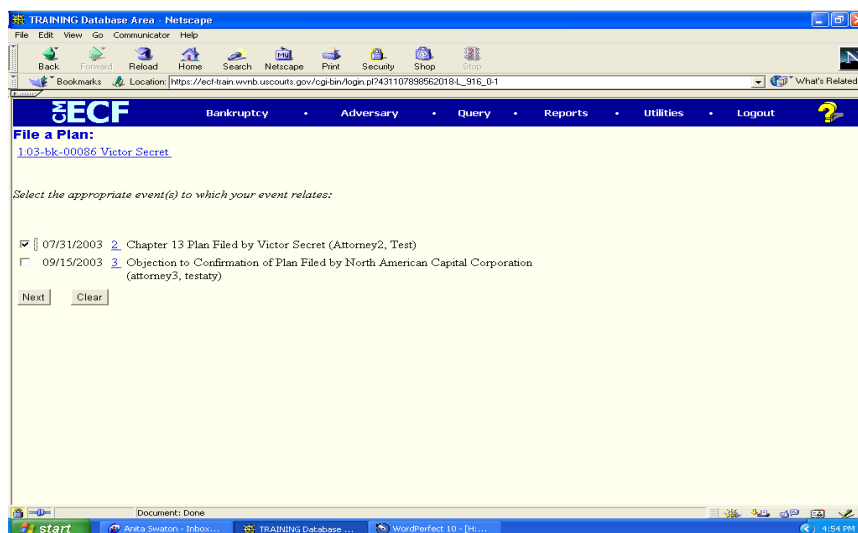


Figure 8b

- ◆ Click [Next] to continue.

**STEP 9:** The **Docket Text: Modify as Appropriate** screen will display. This screen will allow additional text to be added if applicable. (See Figure 9.)

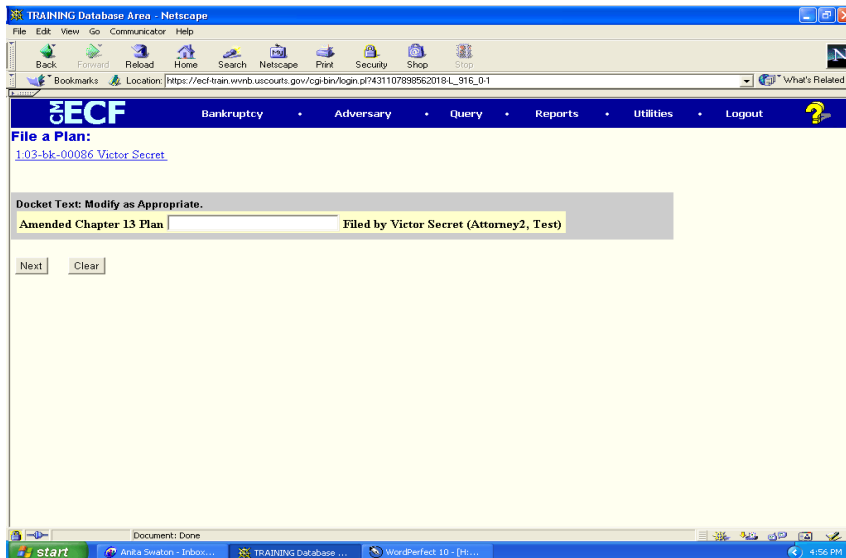
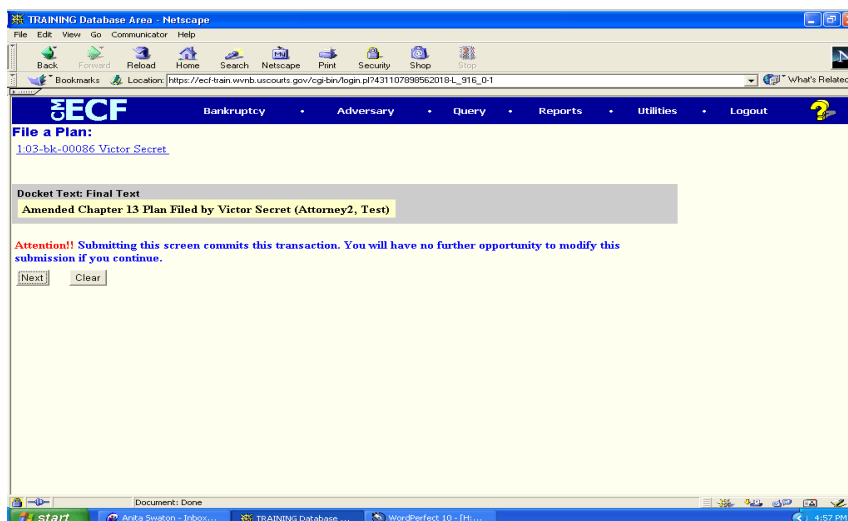


Figure 9

- ◆ Click [Next] to continue.

**STEP 10:** The **FINAL DOCKET TEXT** screen appears. (See Figure 10.)**Figure 10**

- ◆ Proof this screen carefully! No further editing in the case opening process is allowed after this screen. If Docket Text is correct, click **[Next]**.
- ◆ If any part of it is incorrect, click the browser **[Back]** button to return to the screen you need to correct. Then process the screens again with the respective **[Next]** or **[Submit]** buttons.

**NOTE:** To abort or restart the transaction at any time up until the final docket text screen, click the **Bankruptcy** hyperlink on the **Menu Bar**.

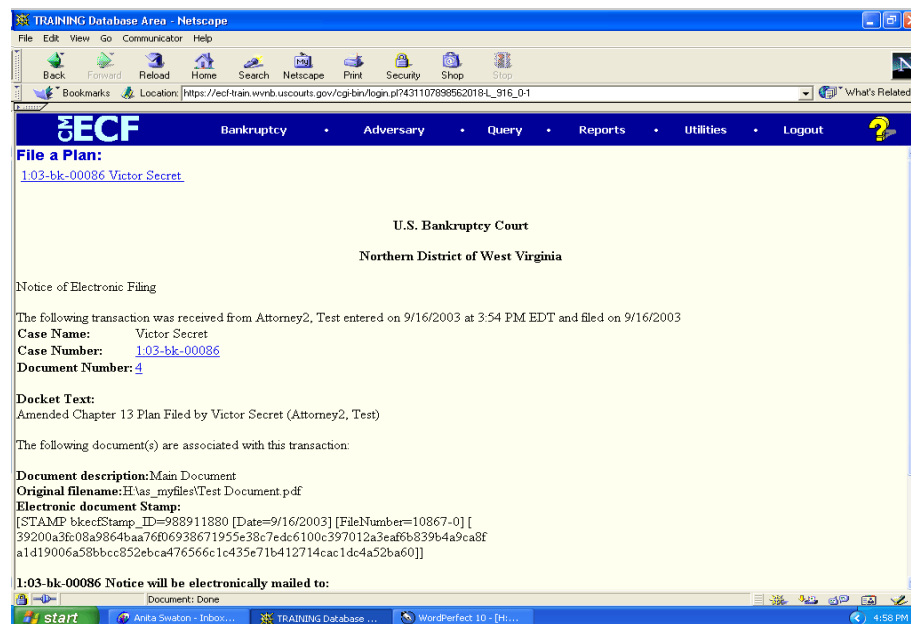
**STEP 11** The **NOTICE OF ELECTRONIC FILING** screen appears.

- ◆ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that this is now an official court document. (See Figure 11.)
- ◆ The case number is a hyperlink to the docket sheet and the document number is a hyperlink to the PDF document image.
- ◆ To print a copy of this notice, click the browser **[Print]** icon.

- ◆ To save a copy of this notice, click **[File]** on the browser menu bar and select **Save Frame As**.
- ◆ Further access to the **Notice of Electronic Filing** is available through the electronic docket report. When this option is selected, a bullet appears next to the document number of the event on the docket report. Clicking on this bullet will display a copy of this notice.
- ◆ When a copy of the **Notice of Electronic Filing** is mailed to each subscriber on the case, the following message will display at the top:

**\*\*\*NOTE TO PUBLIC ACCESS USERS\*\*\***

***You may view the filed documents once without charge. To avoid later charges, download a copy of each document during this first viewing.***



**Figure 11**

# Disclosure Statement

This process shows the steps and screens required for attorneys to file a Disclosure Statement in a Chapter 11 proceeding.

**STEP 1** Click the Bankruptcy hyperlink on the CM/ECF main menu bar. (See Figure 1.)



**Figure 1**

**STEP 2** Click on the Plan hyperlink displayed on the **BANKRUPTCY EVENTS** screen. (See Figure 2.)

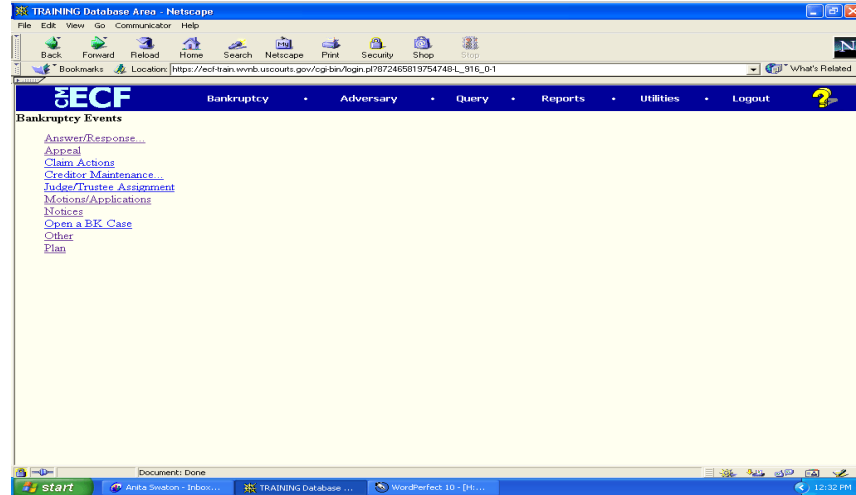


Figure 2

**STEP 3** The **CASE NUMBER** screen displays. (See Figure 3a.)

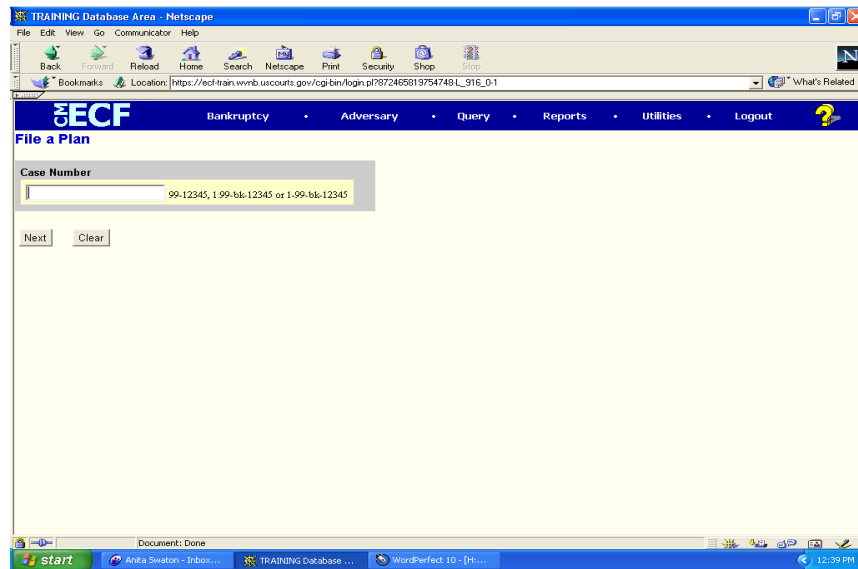


Figure 3a

- ◆ Enter the case number (See Figure 3b.)

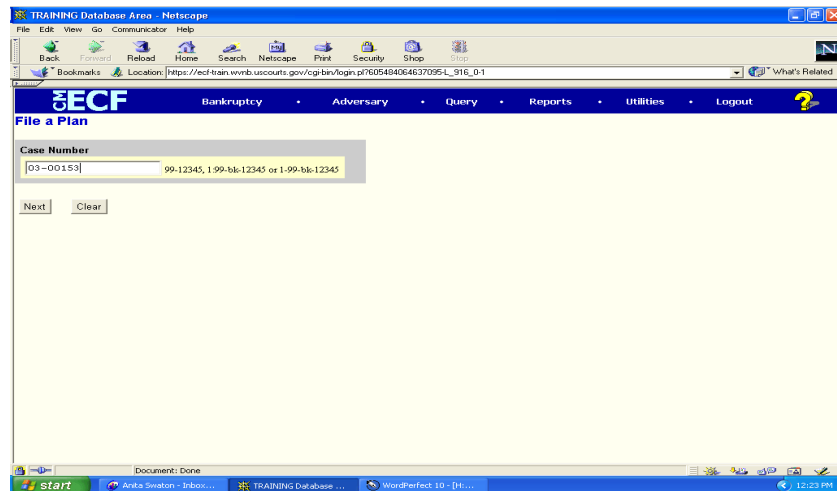


Figure 3b

- ◆ Click **[Next]** to continue.

**STEP 4** The following screen displays. (See Figure 4a.)

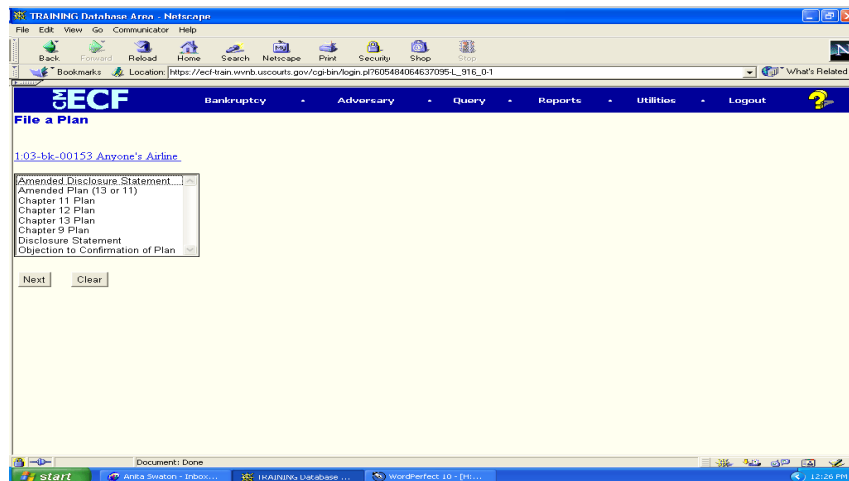


Figure 4a

- ◆ Select **Disclosure Statement**. (See Figure 4b.)

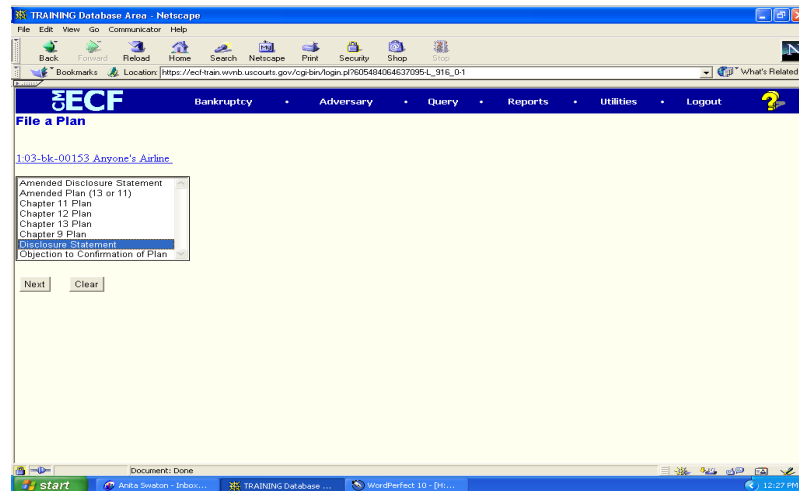


Figure 4b

- ◆ Click **[Next]** to continue.

**STEP 5:** The **Joint Filing With Other Attorneys** screen displays. (See **Figure 5.**)

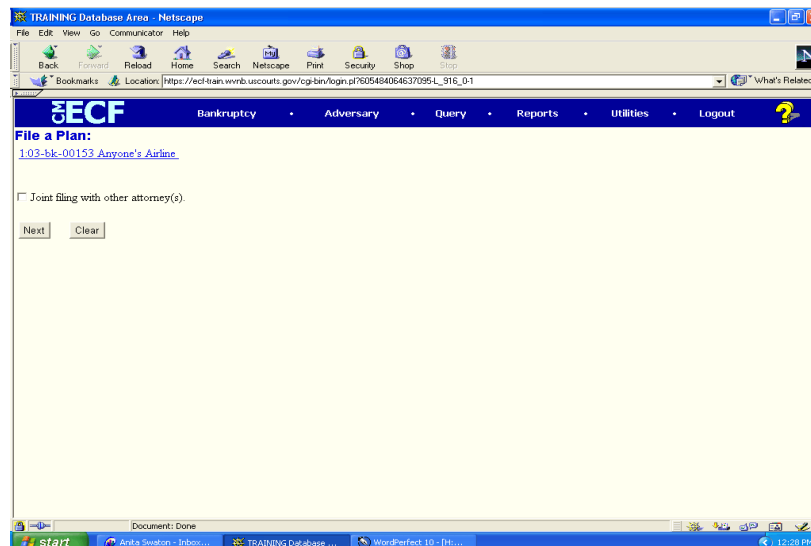
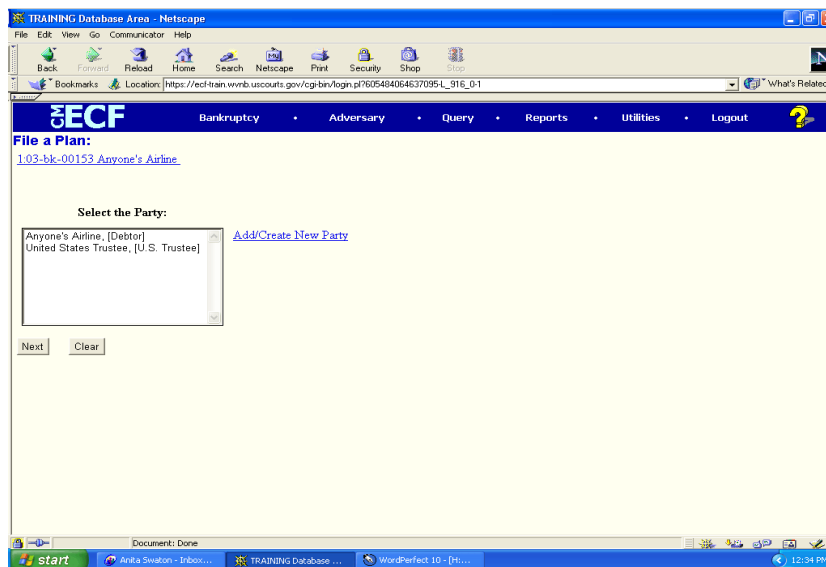


Figure 5

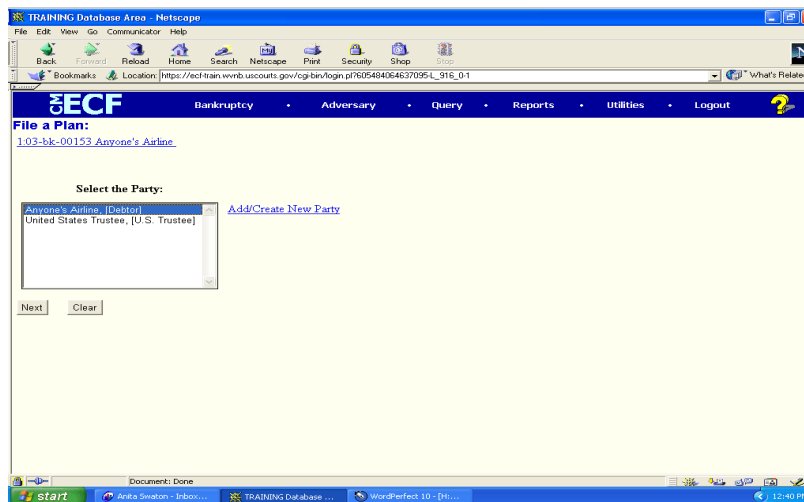
- ◆ Click in the **Joint filing with other attorney(s)** box only if this is a joint filing to add any additional attorneys.
- ◆ Click **[Next]** to continue.

**STEP 6:** The **Select the Party** screen displays. (See Figure 6a.) All participating parties in the case will appear on this list.



**Figure 6a**

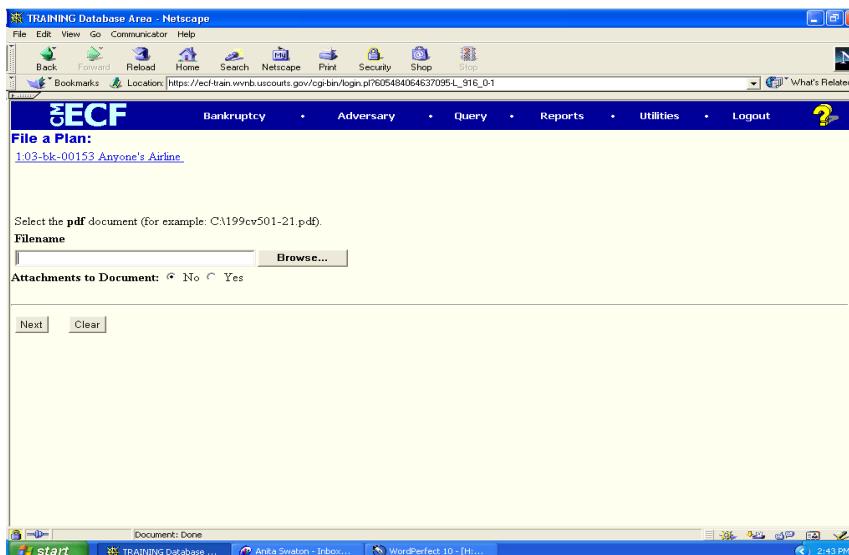
◆ Click to highlight the name of the debtor(s). (See Figure 6b.)



**Figure 6b**

◆ Click **[Next]** to continue.

**STEP 7:** The **PDF DOCUMENT SELECTION** screen displays. (See Figure 7a.)



**Figure 7a**

- ◆ To associate the imaged document with this entry, select the PDF filename of the objection you are filing.
  - Click **[Browse]**. In the **File Upload** screen change **Files of type:** to **All files(\*.\*)** then navigate to the directory where the appropriate PDF file is located and select it with your mouse.
  - To make certain you are about to associate the correct PDF file for this entry, right click on the filename with your mouse and select **Open**.
  - This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct.
  - Close or minimize the Adobe application and if that is the correct file, click **[Open]** on the File Upload dialogue box.
- ◆ The **PDF DOCUMENT SELECTION** screen appears with the path and PDF document in the **Filename** box. (See Figure 7b.)

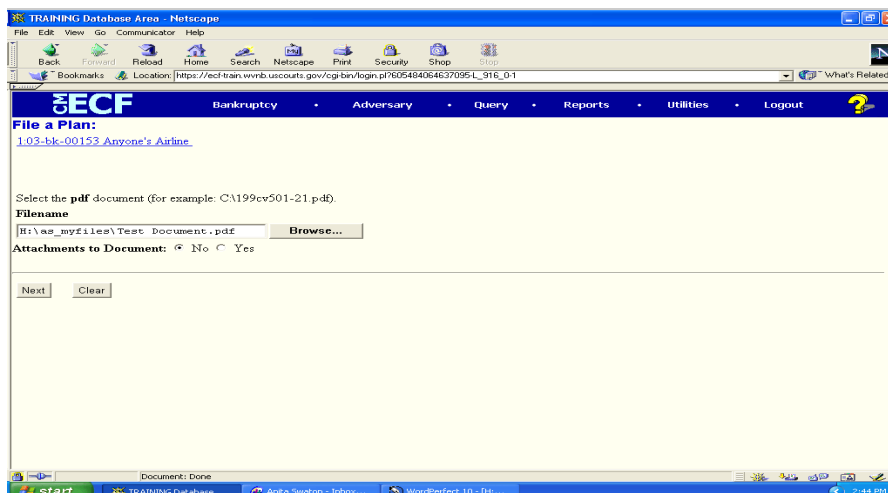


Figure 7b

- ◆ The **Attachments to Document** option defaults to **No**. If you have attachments to this document, click the **Yes** radio button to indicate there are attachments. (Refer to module: *Attachments to Documents* for more information.)
- ◆ Click **[Next]** to continue.

**STEP 8:** The **Docket Text: Modify as Appropriate** screen will display. This screen will allow additional text to be added if applicable. (See Figure 8a.)

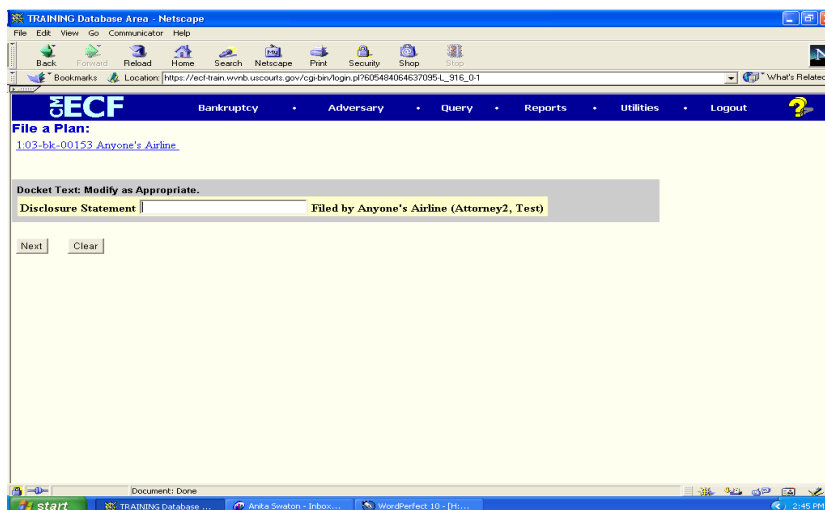
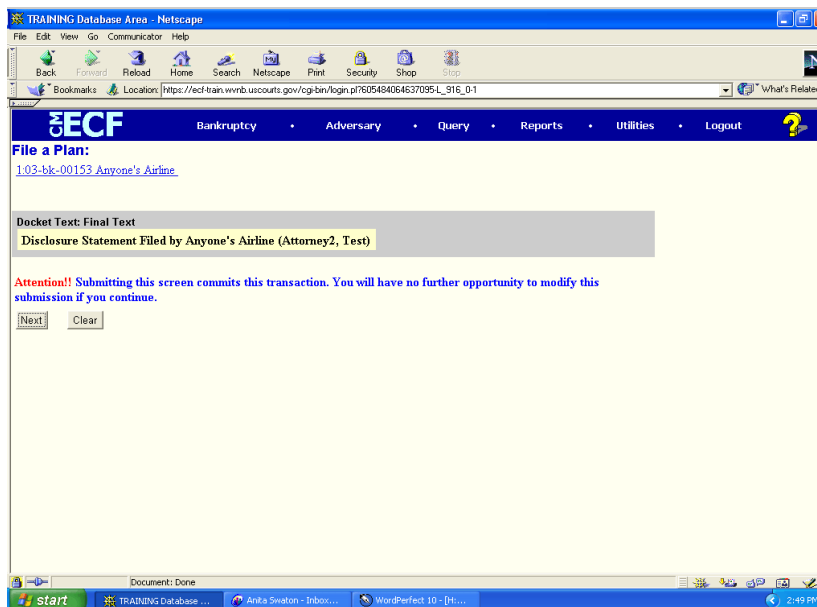


Figure 8a

- ◆ Click **[Next]** to continue.

**STEP 9:** The **FINAL DOCKET TEXT** screen appears. (See Figure 9.)



**Figure 9**

- ◆ Proof this screen carefully! No further editing in the case opening process is allowed after this screen. If Docket Text is correct, click **[Next]**.
- ◆ If any part of it is incorrect, click the browser **[Back]** button to return to the screen you need to correct. Then process the screens again with the respective **[Next]** or **[Submit]** buttons.

**NOTE:** To abort or restart the transaction at any time up until the final docket text screen, click the **Bankruptcy** hyperlink on the **Menu Bar**.

**STEP 10** The **NOTICE OF ELECTRONIC FILING** screen appears.

- ◆ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that this is now an official court document. **(See Figure 10.)**
- ◆ The case number is a hyperlink to the docket sheet and the document number is a hyperlink to the PDF document image.
- ◆ To print a copy of this notice, click the browser **[Print]** icon.
- ◆ To save a copy of this notice, click **[File]** on the browser menu bar and select **Save Frame As**.
- ◆ Further access to the **Notice of Electronic Filing** is available through the electronic docket report. When this option is selected, a bullet appears next to the document number of the event on the docket report. Clicking on this bullet will display a copy of this notice.
- ◆ When a copy of the **Notice of Electronic Filing** is mailed to each subscriber on the case, the following message will display at the top:

**\*\*\*NOTE TO PUBLIC ACCESS USERS\*\*\***

***You may view the filed documents once without charge. To avoid later charges, download a copy of each document during this first viewing.***

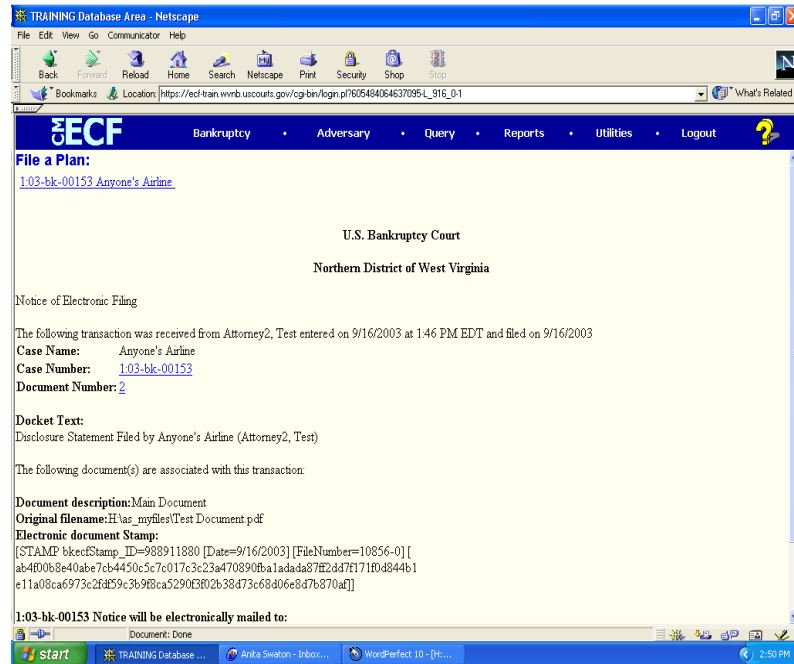
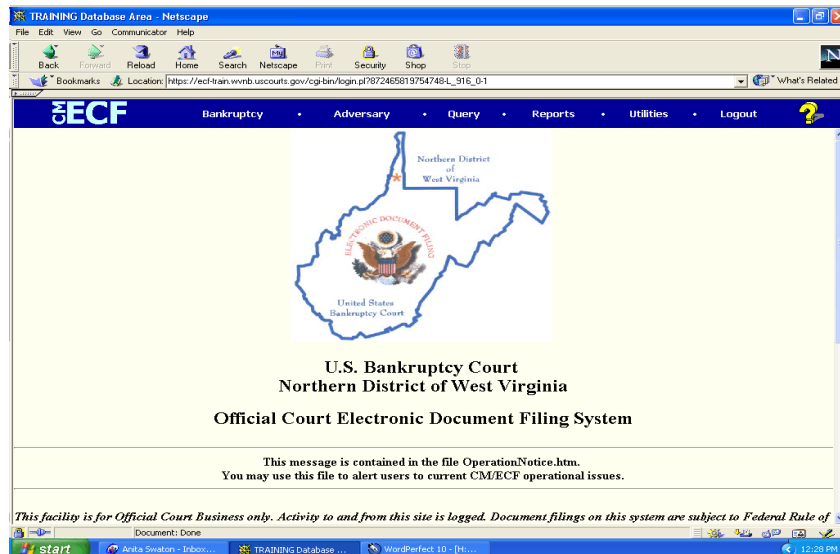


Figure 10

# Amended Disclosure Statement

This process shows the steps and screens required for attorneys to file an Amended Disclosure Statement in a Chapter 11 proceeding.

**STEP 1** Click the Bankruptcy hyperlink on the CM/ECF main menu bar. (See Figure 1.)



**Figure 1**

**STEP 2** Click on the Plan hyperlink displayed on the **BANKRUPTCY EVENTS** screen. (See Figure 2.)

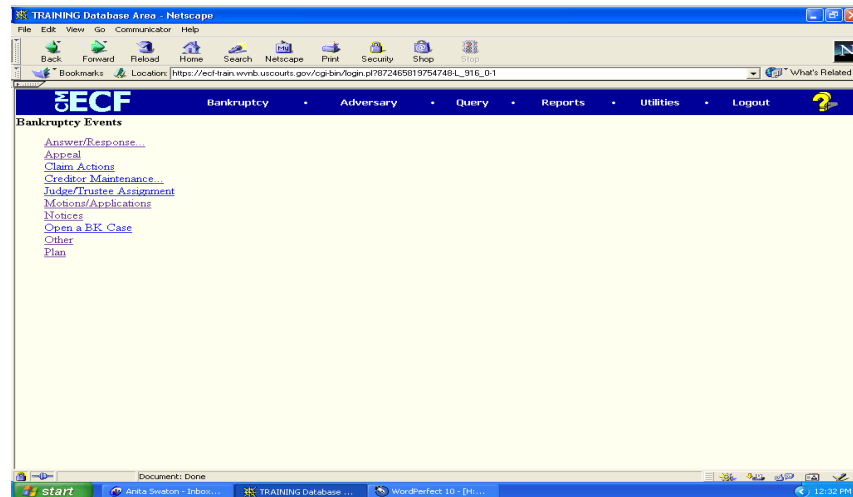


Figure 2

**STEP 3** The **CASE NUMBER** screen displays. (See Figure 3a.)

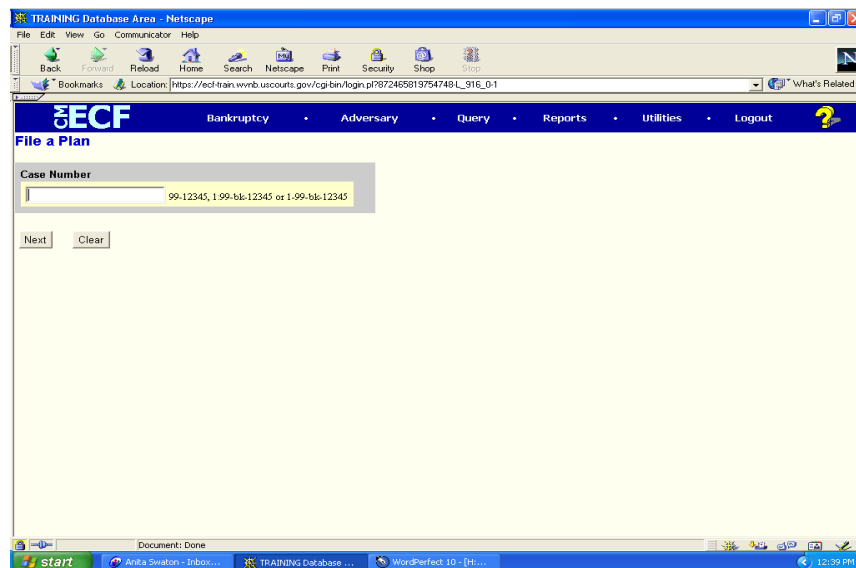


Figure 3a

- ◆ Enter the case number (See Figure 3b.)

TRAINING Database Area - Netscape

File Edit View Go Communicator Help

Back Forward Reload Home Search Netscape Print Security Shop Stop

Bookmarks Location: [https://ecf-train.wvmb.uscourts.gov/cgi-bin/login.pl?645004392365835L\\_916\\_0-1](https://ecf-train.wvmb.uscourts.gov/cgi-bin/login.pl?645004392365835L_916_0-1)

ECF Bankruptcy Adversary Query Reports Utilities Logout

File a Plan

Case Number

03-00153 99-12345, 199-bk-12345 or 1-99-bk-12345

Next Clear

Document: Done

start Anika Swaton - Inbox... WordPerfect 10 - [H... TRAINING Database ... 4:13 PM

Figure 3b

◆ Click **[Next]** to continue.

**STEP 4** The following screen displays. (See Figure 4a.)

TRAINING Database Area - Netscape

File Edit View Go Communicator Help

Back Forward Reload Home Search Netscape Print Security Shop Stop

Bookmarks Location: [https://ecf-train.wvmb.uscourts.gov/cgi-bin/login.pl?645004392365835L\\_916\\_0-1](https://ecf-train.wvmb.uscourts.gov/cgi-bin/login.pl?645004392365835L_916_0-1)

ECF Bankruptcy Adversary Query Reports Utilities Logout

File a Plan

[1.03-bk-00153 Anyone's Airline](#)

Amended Disclosure Statement  
Amended Plan (13 or 11)  
Chapter 11 Plan  
Chapter 12 Plan  
Chapter 13 Plan  
Chapter 9 Plan  
Disclosure Statement  
Objection to Confirmation of Plan

Next Clear

Document: Done

start Anika Swaton - Inbox... WordPerfect 10 - [H... TRAINING Database ... 4:16 PM

Figure 4a

- ◆ Verify the case number and case name.
- ◆ If the case number and name do not match your document, click the browser **[Back]** button to try again. You may use the browser **[Back]** button at any time during this process to verify former screens until the final submission.
- ◆ Select **Amended Disclosure Statement**. (See Figure 4b.)

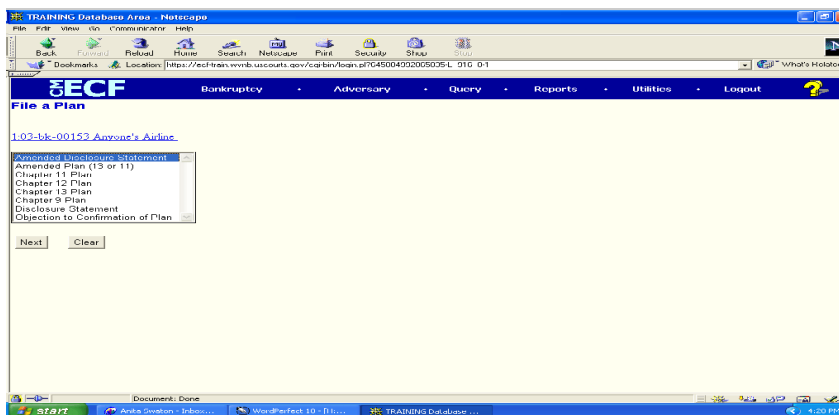


Figure 4b

- ◆ Click **[Next]** to continue.

**STEP 5:** The **Joint Filing With Other Attorneys** screen displays. (See Figure 5.)

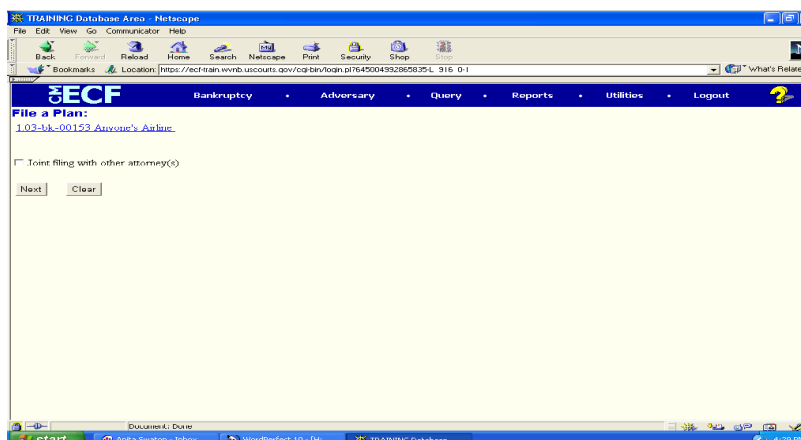
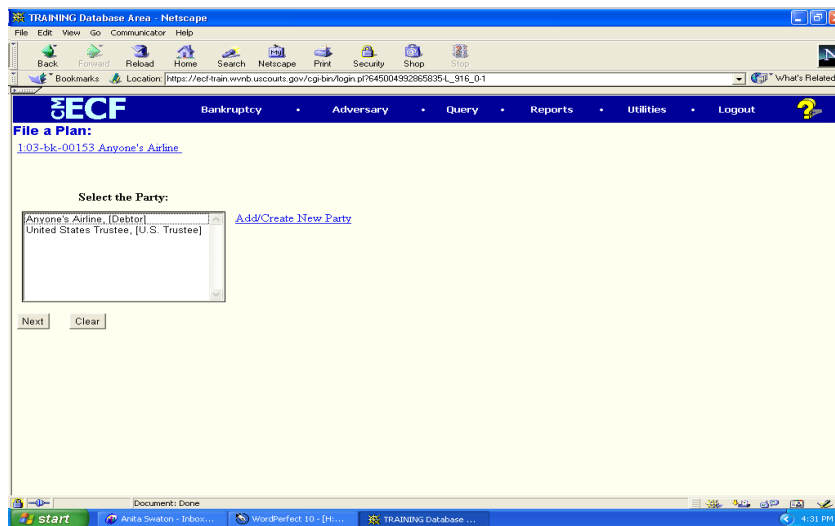


Figure 5

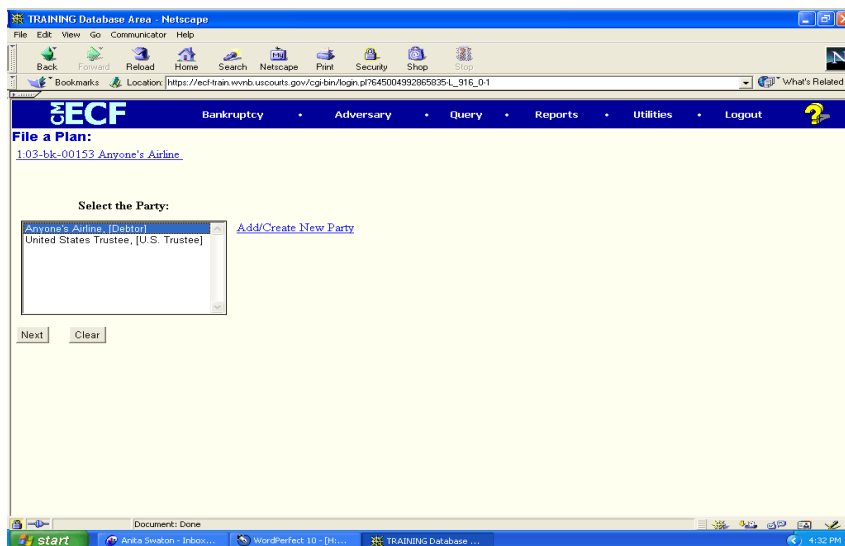
- ◆ Click in the **Joint filing with other attorney(s)** box only if this is a joint filing to add any additional attorneys.
- ◆ Click **[Next]** to continue.

**STEP 6:** The **Select the Party** screen displays. (See Figure 6a.) All participating parties in the case will appear on this list.



**Figure 6a**

- ◆ Click to highlight the name of the debtor(s). (See Figure 6b.)



**Figure 6b**

- ◆ Click **[Next]** to continue.

**STEP 7:** The **PDF DOCUMENT SELECTION** screen displays. (See Figure 7a.)

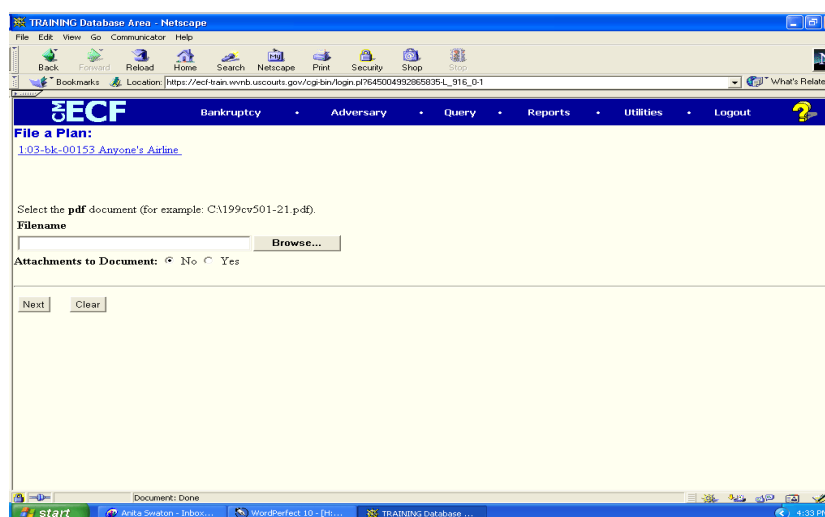


Figure 7a

- ◆ To associate the imaged document with this entry, select the PDF filename of the objection you are filing.
  - Click **[Browse]**. In the **File Upload** screen change **Files of type:** to **All files(\*.\*)** then navigate to the directory where the appropriate PDF file is located and select it with your mouse.
  - To make certain you are about to associate the correct PDF file for this entry, right click on the filename with your mouse and select **Open**.
  - This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct.
  - Close or minimize the Adobe application and if that is the correct file, click **[Open]** on the File Upload dialogue box.

- ◆ The **PDF DOCUMENT SELECTION** screen appears with the path and PDF document in the **Filename** box. (See Figure 7b.)

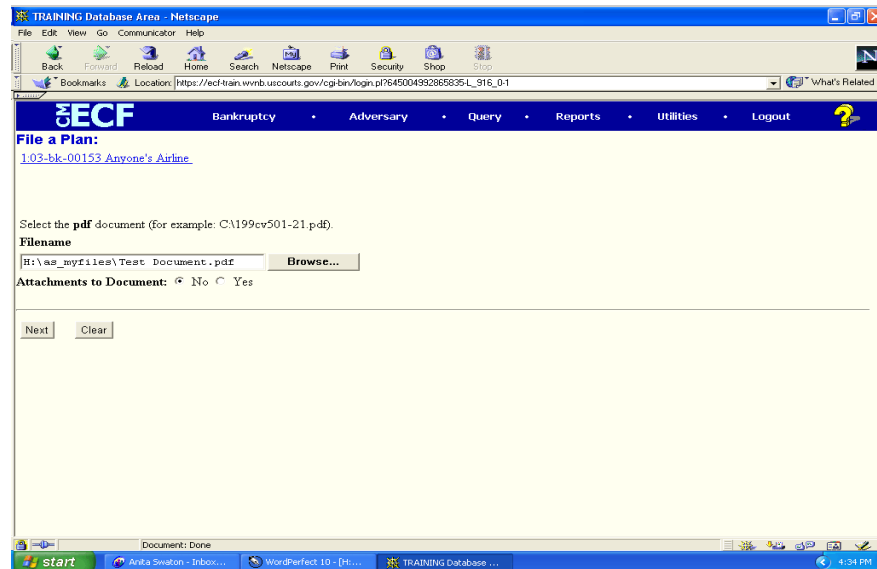


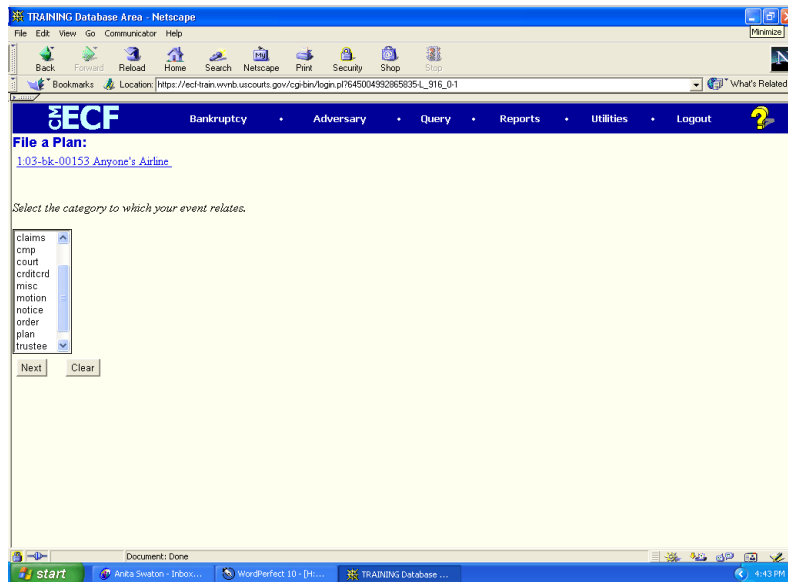
Figure 7b

- ◆ The **Attachments to Document** option defaults to **No**. If you have attachments to this document, click the **Yes** radio button to indicate there are attachments. (Refer to module: *Attachments to Documents* for more information.)
- ◆ Click **[Next]** to continue.

**STEP 8:** The following screen appears. (See Figure 8a.)

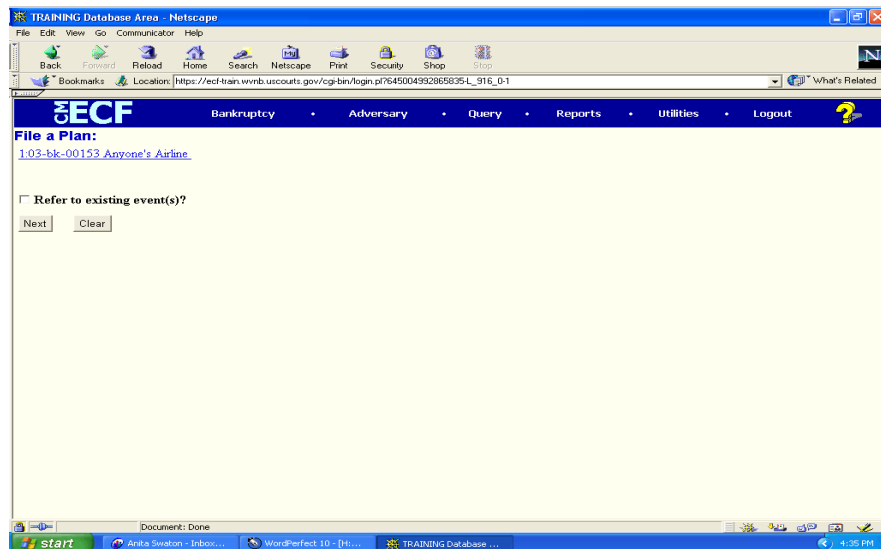
- ◆ Click ***Refer to existing event(s)?***
- ◆ Click **[Next]** to continue.

**STEP 9:** The **Select the category to which your event relates** screen displays. (See Figure 9a.)



**Figure 9a**

- ◆ Click on plan (See Figure 9b.)



**Figure 8a**

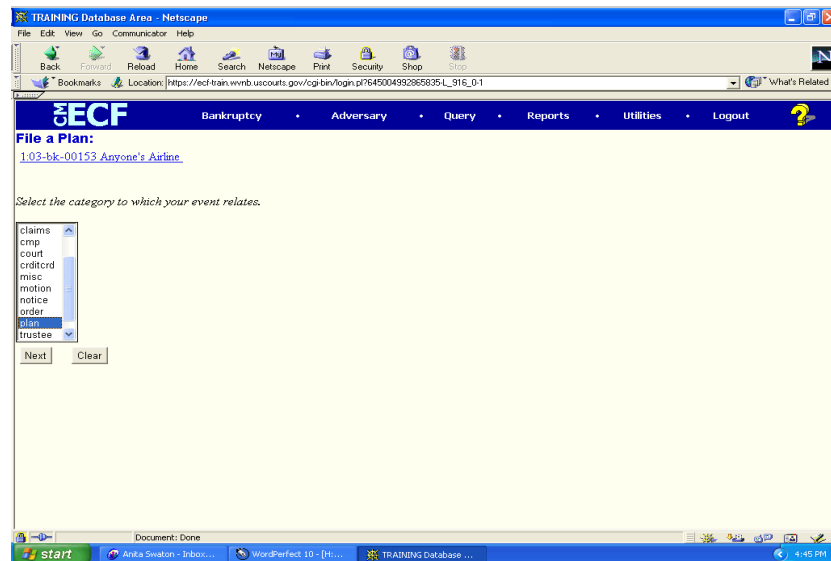


Figure 9b

- ◆ Click **[Next]** to continue.

**STEP 10:** The **Select the appropriate event(s) to which your event relates** screen appears. (See Figure 10.)

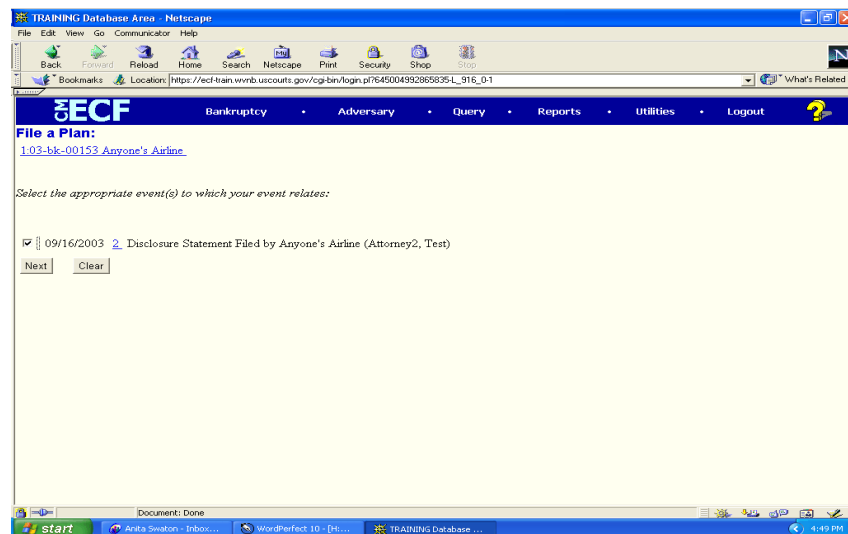


Figure 10

- ◆ Disclosure Statement should remain selected.
- ◆ Click **[Next]** to continue.

**STEP 11:** The **Docket Text: Modify as Appropriate** screen will display. This screen will allow additional text to be added if applicable. (See Figure 11a.)

- ◆ Click on the down arrow to select prefix if applicable. (See Figure 11b.)

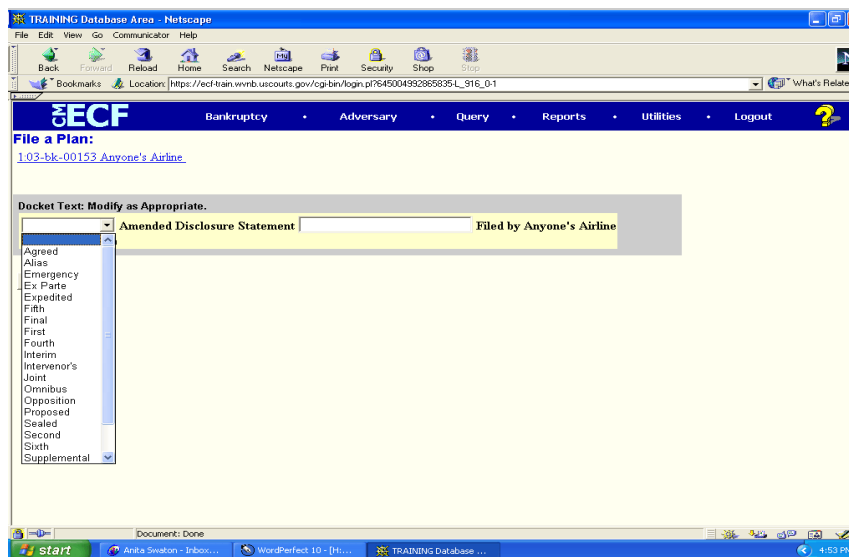


Figure 11b

- ◆ Click [Next] to continue.

**STEP 12:** The **FINAL DOCKET TEXT** screen appears. (See Figure 12.)

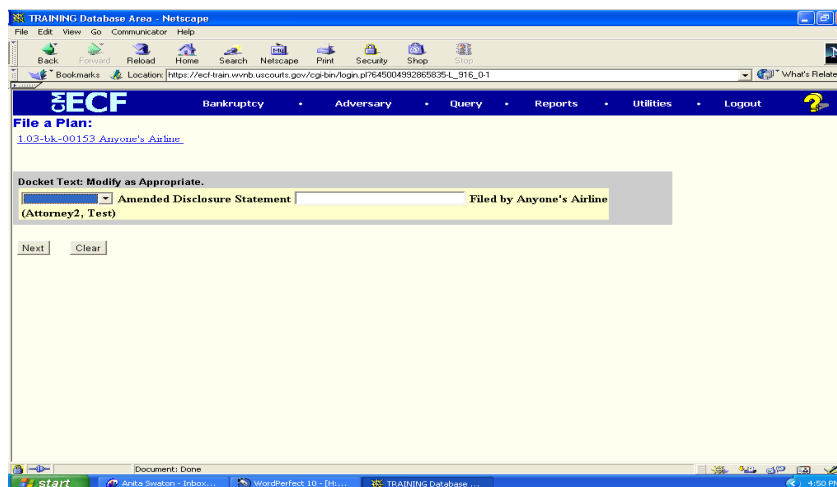


Figure 11a

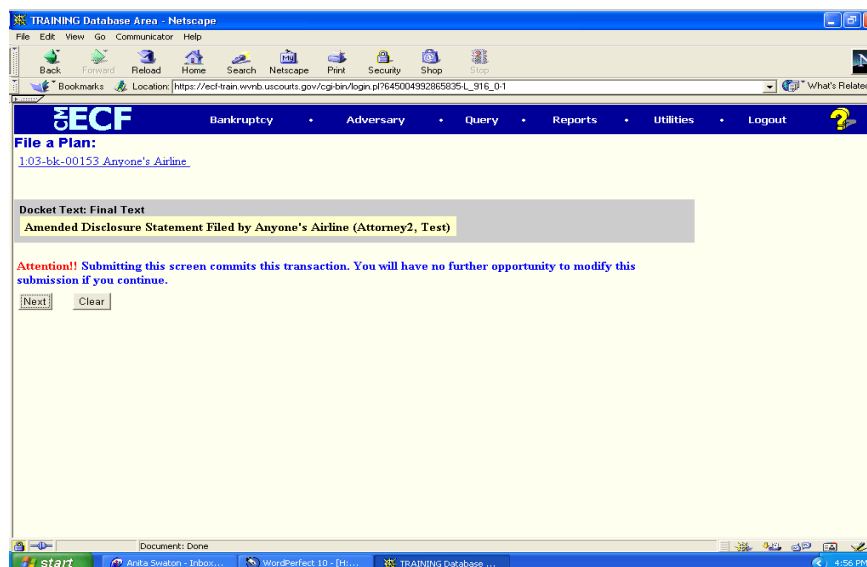


Figure 12

- ◆ Proof this screen carefully! No further editing in the case opening process is allowed after this screen. If Docket Text is correct, click **[Next]**.
- ◆ If any part of it is incorrect, click the browser **[Back]** button to return to the screen you need to correct. Then process the screens again with the respective **[Next]** or **[Submit]** buttons.

**NOTE:** To abort or restart the transaction at any time up until the final docket text screen, click the **Bankruptcy** hyperlink on the **Menu Bar**.

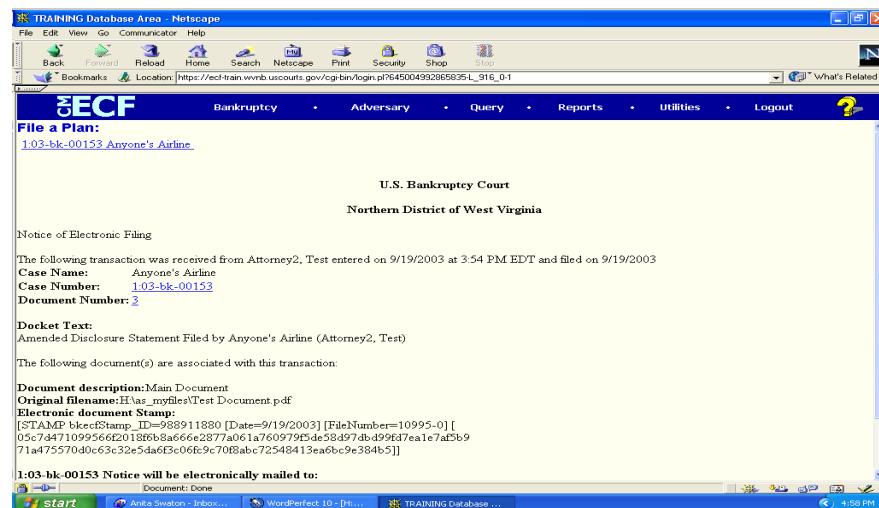
**STEP 13** The **NOTICE OF ELECTRONIC FILING** screen appears.

- ◆ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that this is now an official court document. **(See Figure 13.)**
- ◆ The case number is a hyperlink to the docket sheet and the document number is a hyperlink to the PDF document image.
- ◆ To print a copy of this notice, click the browser **[Print]** icon.

- ◆ To save a copy of this notice, click **[File]** on the browser menu bar and select **Save Frame As**.
- ◆ Further access to the **Notice of Electronic Filing** is available through the electronic docket report. When this option is selected, a bullet appears next to the document number of the event on the docket report. Clicking on this bullet will display a copy of this notice.
- ◆ When a copy of the **Notice of Electronic Filing** is mailed to each subscriber on the case, the following message will display at the top:

**\*\*\*NOTE TO PUBLIC ACCESS USERS\*\*\***

You may view the filed documents once without charge. To avoid later charges, download a copy of each document during this first viewing.



**Figure 13**

## Single-Part Motions/Applications

This process will demonstrate the steps to file a motion in the CM/ECF system. The example shows the electronic filing of a motion that requests only one type of relief (relief from stay). **The same steps would be followed for other types of single-relief motions and applications.** See also: *Multi-Part Motions/Applications* for guidance on filing a document with more than one relief such as motion for relief from stay and for adequate protection.

**STEP 1** Click on the Bankruptcy hyperlink on the CM/ECF Main Menu Bar. (See Figure 1.)

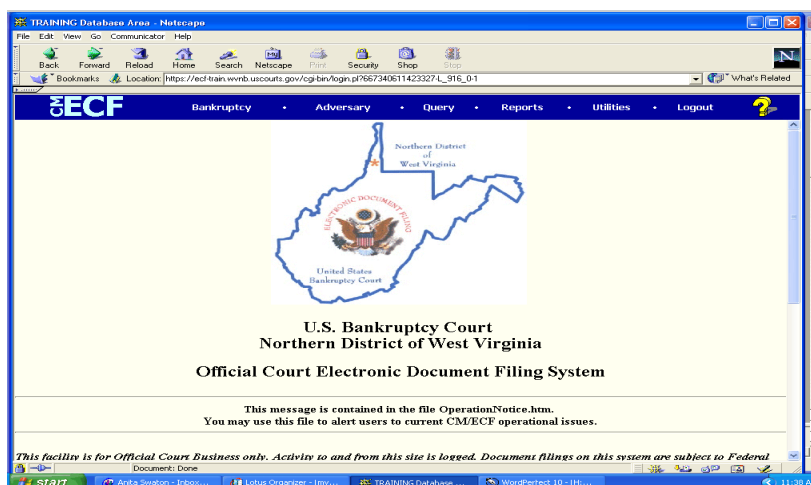


Figure 1

**STEP 2** The **BANKRUPTCY EVENTS** screen displays. (See Figure 2.)

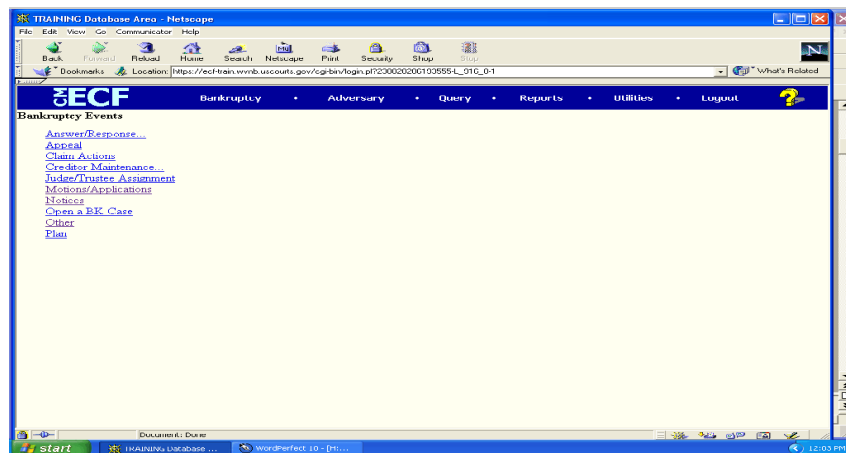


Figure 2

- ◆ Click the Motions/Applications hyperlink.

**STEP 3** The **CASE NUMBER** screen displays. (See Figure 3a.)

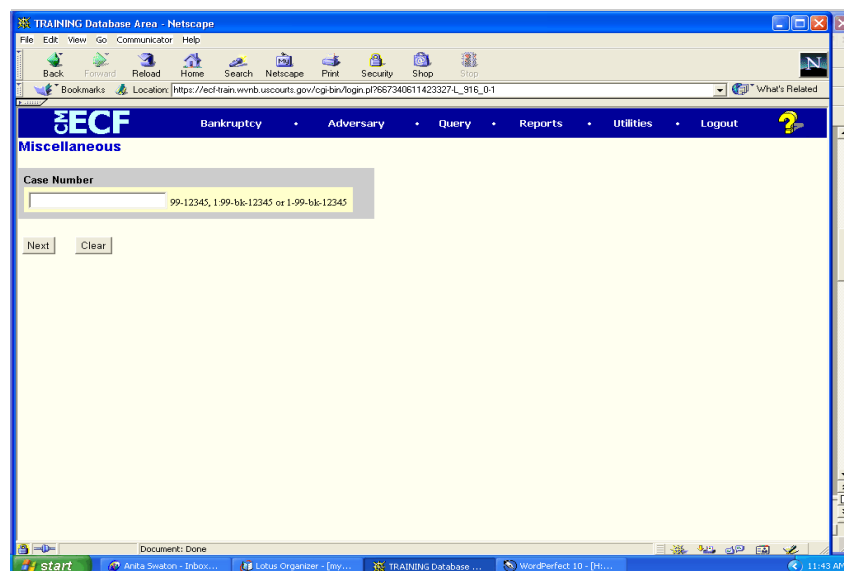


Figure 3a

- ◆ Enter the case number. (See Figure 3b.)

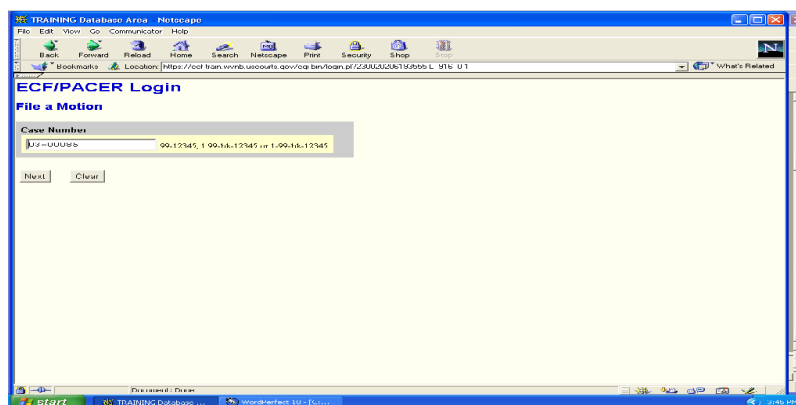


Figure 3b

- ◆ Click **[Next]** to continue.

**STEP 4** The **File a Motion** screen displays. (See Figure 4a.)

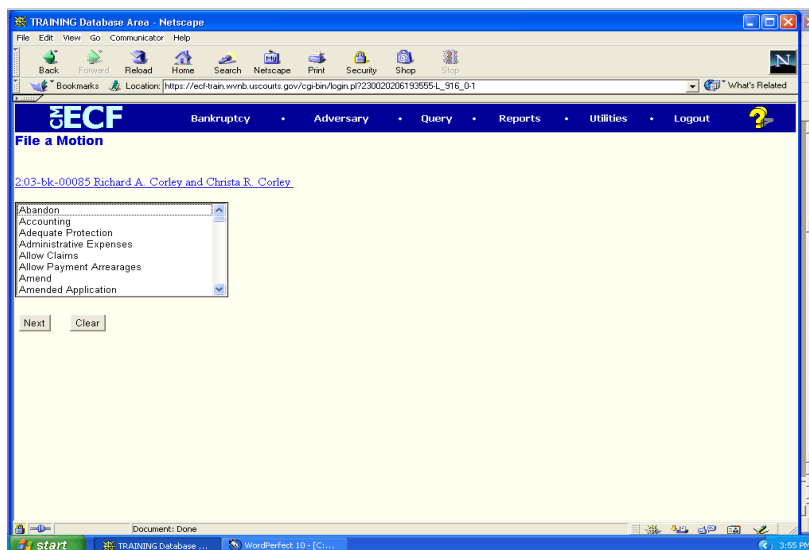


Figure 4a

- ◆ Verify the case name and case number that are displayed.
- ◆ If the case name and number are incorrect, click the browser **[Back]** button to re-enter the case number.
- ◆ If the system prompts that you have entered an invalid case number, click the browser **[Back]** button to try again.

- ◆ Using the up and down arrows to the right of the box, scroll the options to highlight the type of document being filed. In this lesson, select **Relief from Stay**. (See Figure 4b)

**NOTE:** You may also type the first letter of a relief (in this case 'R') to immediately move to the list of reliefs that begin with a particular letter.

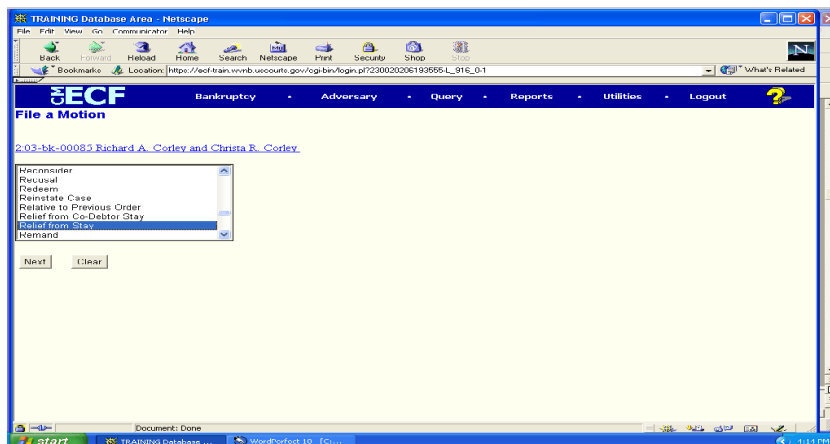


Figure 4b

- ◆ Click [Next] to continue.

**STEP 5** The Joint Filing With Other Attorneys screen displays. (See Figure 5.)

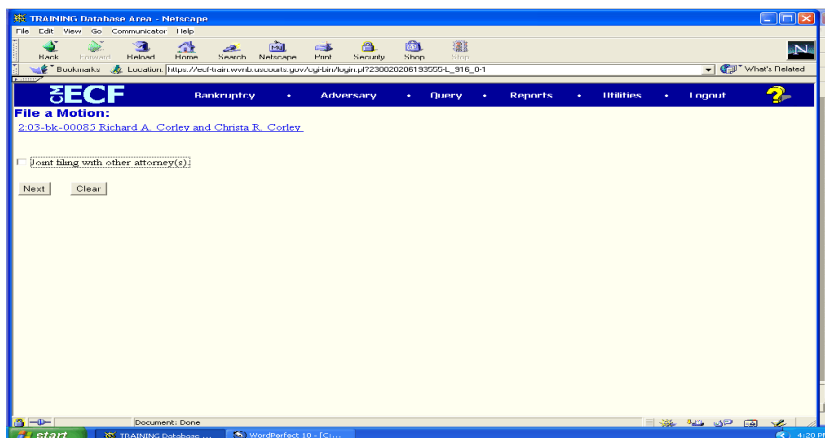
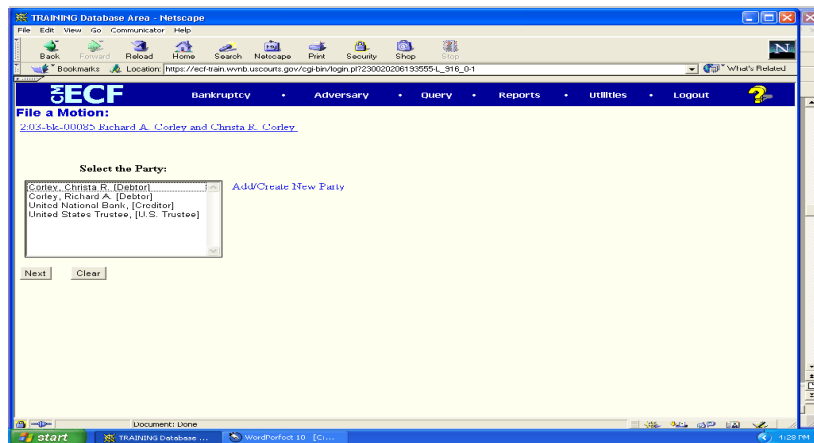


Figure 5

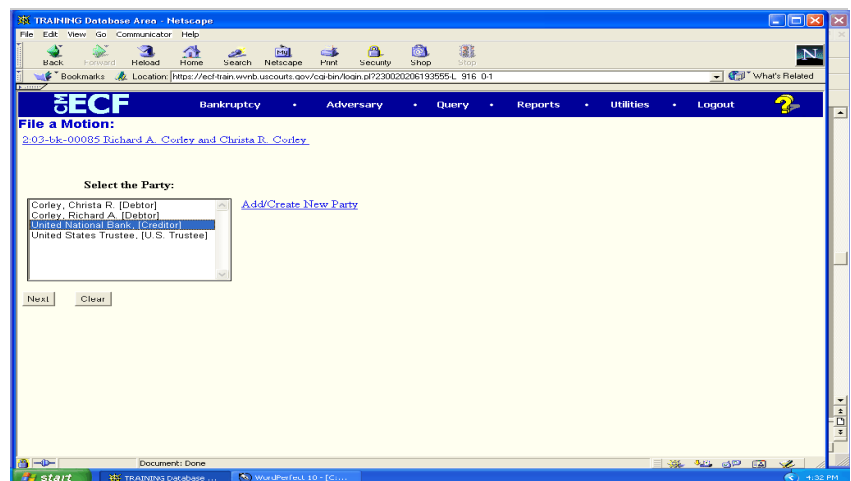
- ◆ If this filing is joint with another attorney, click to place a check in the Joint Filing box. If this is not a joint filing, no action is required.
- ◆ Click **[Next]** to continue.

**STEP 6** The **Select the Party** screen displays. (See Figure 6a.)



**Figure 6a**

- ◆ Click the down arrow to scroll the **Select the Party** box to locate the party filer (whom you are representing).
- ◆ Click to highlight and select the party for which the document is filed. (See Figure 6b.)
- ◆ Then click **[Next]**.



**Figure 6b**

- ◆ If the party filer does **not** appear in the **Select the Party** box, Click on **Add/Create New Party**.
- ◆ The **Search for a Party** screen displays. (See Figure 6c.)

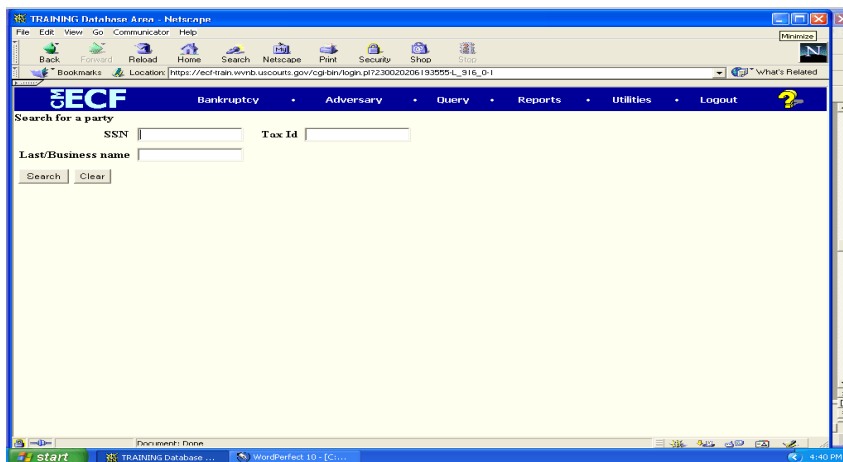


Figure 6c

- ◆ On **Search for a Party** screen, enter the name of the party you represent in the **Last/Business Name** field. (See Figure 6d.)

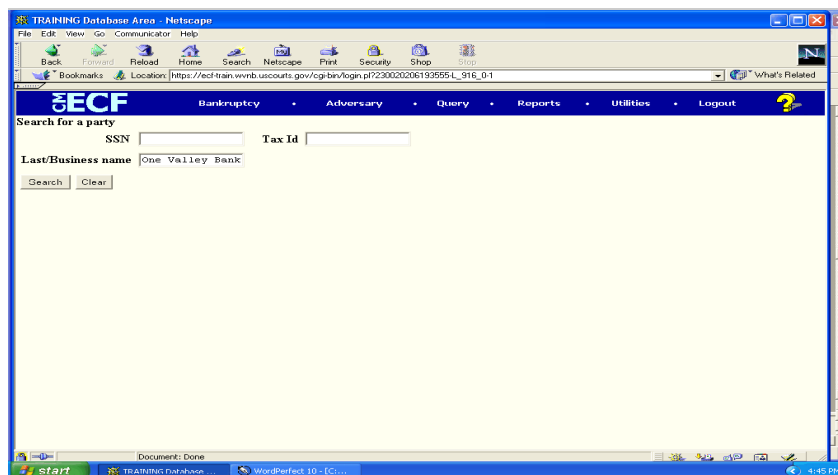


Figure 6d

- ◆ Then click **Search**.
- ◆ If the name of the party you are representing is not contained in the court's database for this case, you will

receive the following message: **No person found.** Select **Create new party.** (See Figure 6e.)

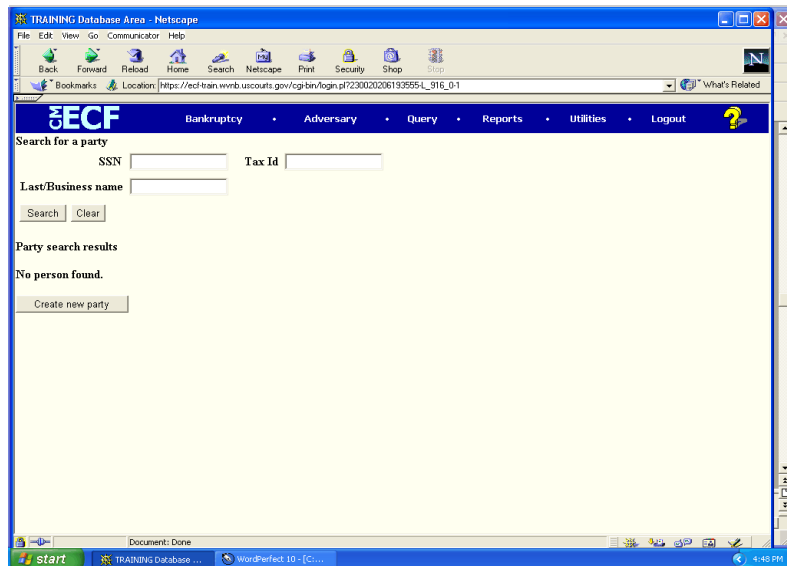


Figure 6e

- ◆ Complete the **Party Information** screen. The party's name will be displayed. Enter address by using Address 1, Address 2 and Address 3 fields and City, State and Zip fields. The **Pro Se** field should remain **No** as you are filing the motion on behalf of the creditor.
- ◆ Select **Creditor (cr:cr)** as **Role** type.

(See Figure 6f.)

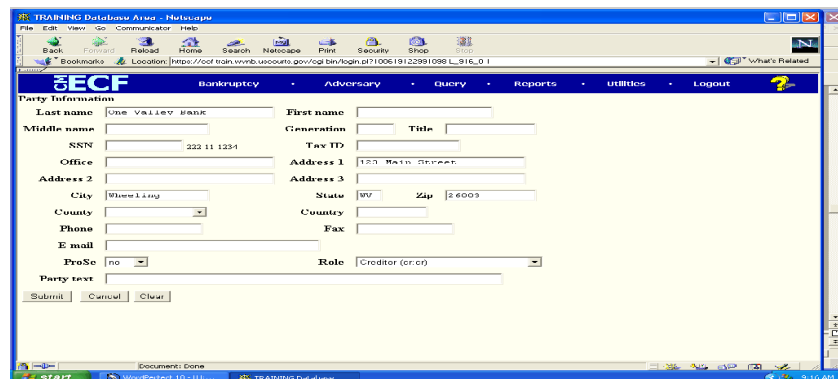


Figure 6f

- ◆ Then click **Submit.**

- ◆ The **Select the Party** screen will display. Select the creditor you added. (See Figure 6g.)
- ◆ Then click **[Next]**.

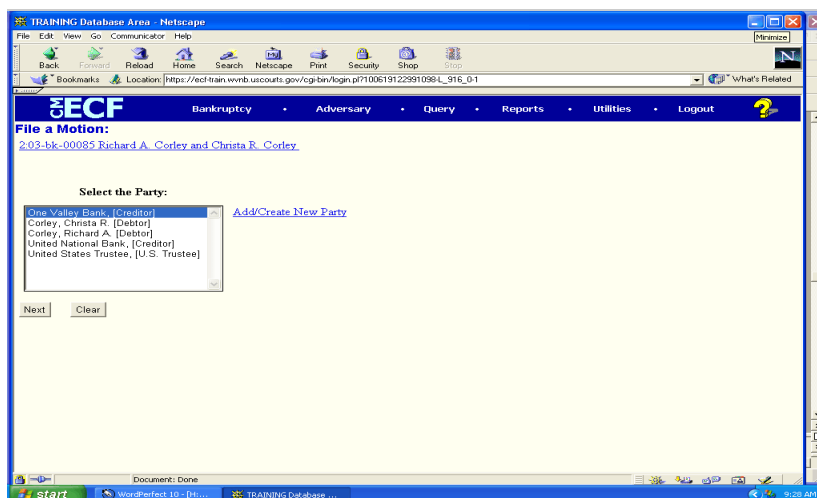


Figure 6g

- ◆ The **Attorney/Party Association** screen will display. Create your association with this party by clicking in the box. (See Figure 6h.)
- ◆ Then click **[Next]**.

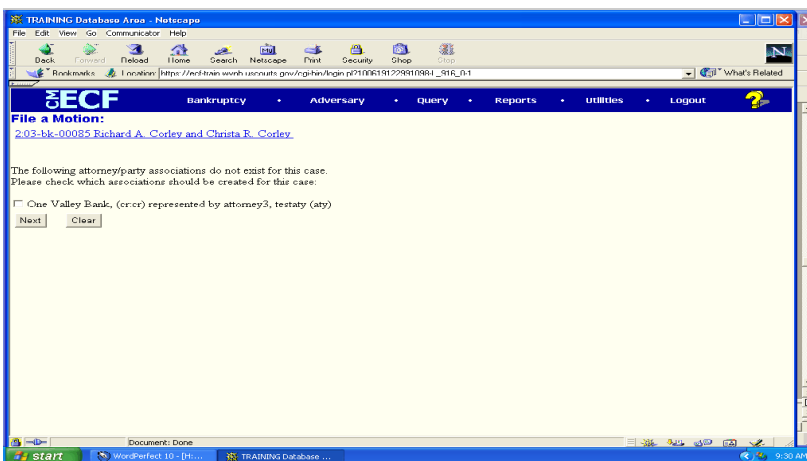
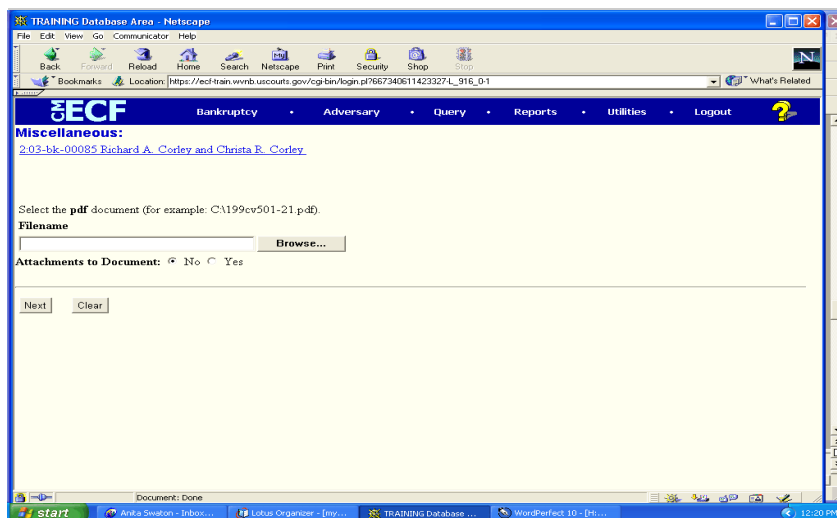


Figure 6h

**STEP 7** The **Select the pdf document** screen displays. (See Figure 7a.)



**Figure 7a**

- ◆ Click **[Browse]**, then navigate to the directory where the PDF file is located. Double-click the PDF file to select it.
- ◆ In the **File Upload** screen, change **Files of type:** to **All Files(\*.\*)**.

**NOTE:** If you wish to view the image before selecting to be sure you have chosen the correct file, before double-clicking, first right click on the highlighted filename and click on **open**. You

can

view the image in Adobe Acrobat, then close Adobe Acrobat

when

you have finished viewing the image.

**(See Figure 7b.)**

- ◆ The **Attachments to Document** option defaults to **No**. If you have attachments to this document, click the **Yes** radio button to indicate there are attachments. (Refer to module: *Attachments to Documents* for more information.)

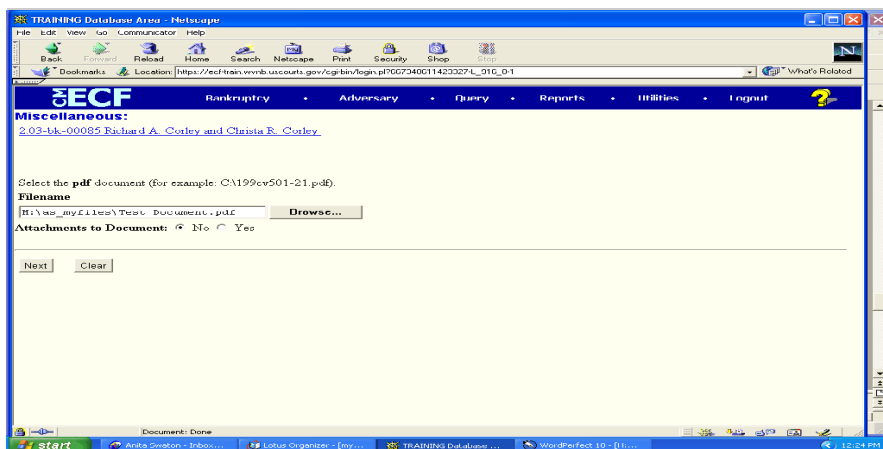


Figure 7b

- ◆ Click **[Next]** to continue.

**STEP 8 (See Figure 8.)**

- ◆ Enter **y** or **n** on this screen if a **Certificate of Service** is being filed with the motion.
- ◆ Click **[Next]** to continue.

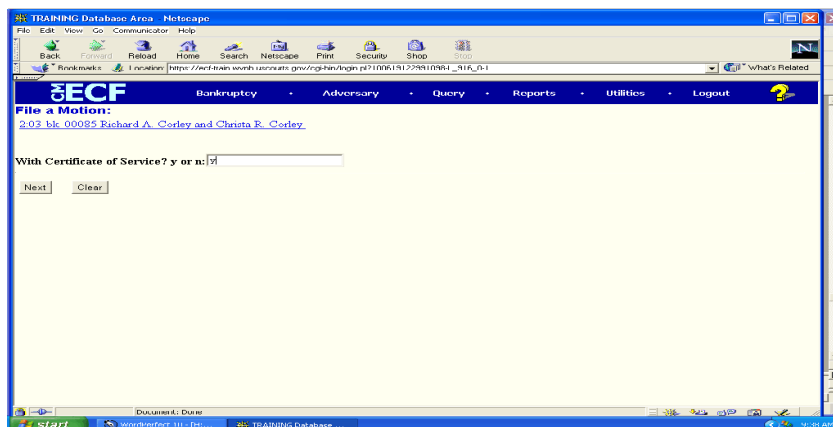


Figure 8

**STEP 9 The Receipt # screen displays. (See Figure 9.)**

- ◆ Enter **CC** for credit card.

- ◆ Click **[Next]** to continue.

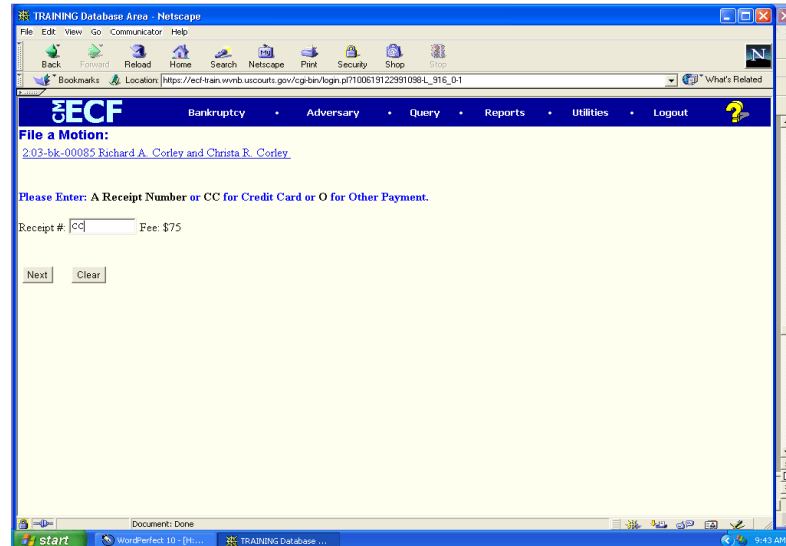


Figure 9

**STEP 10** The **Docket Text: Modify as Appropriate** screen displays. (See Figure 10a.)

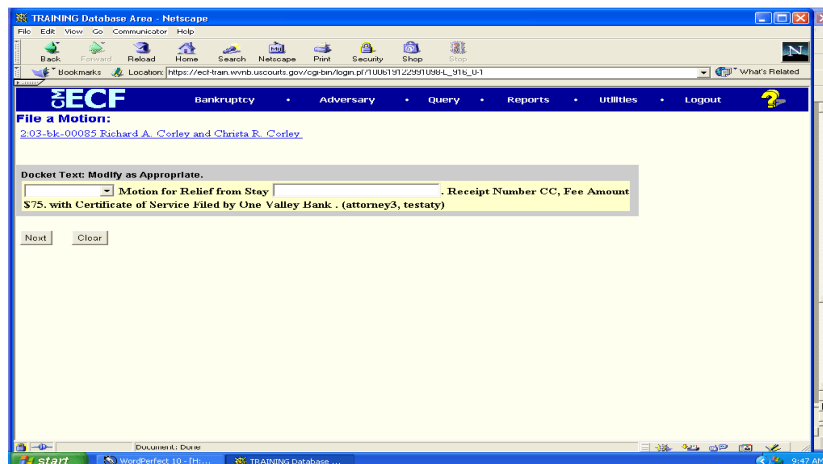


Figure 10a

- ◆ You may insert additional text and/or add a prefix to your docket entry. Click on the down arrow in the white box to

select an appropriate prefix if applicable. (See Figure 10b.)

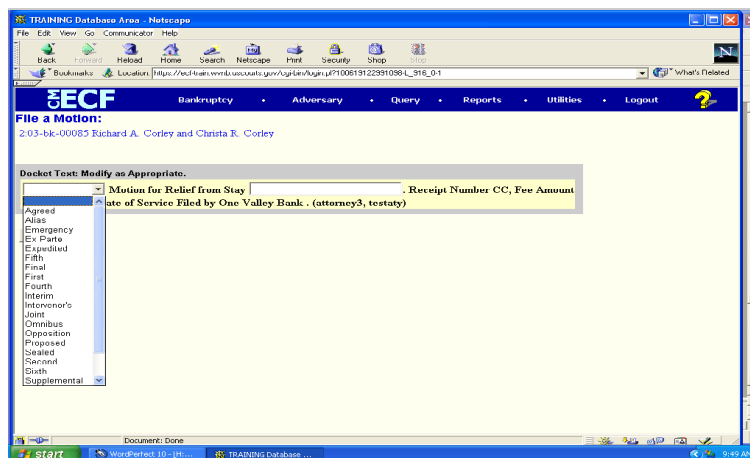


Figure 10b

- ◆ Click **[Next]** to continue.

**STEP 11** The **Docket Text: Final Text** screen displays. (See Figure 11.) This is your **last** opportunity to make corrections to your entry.

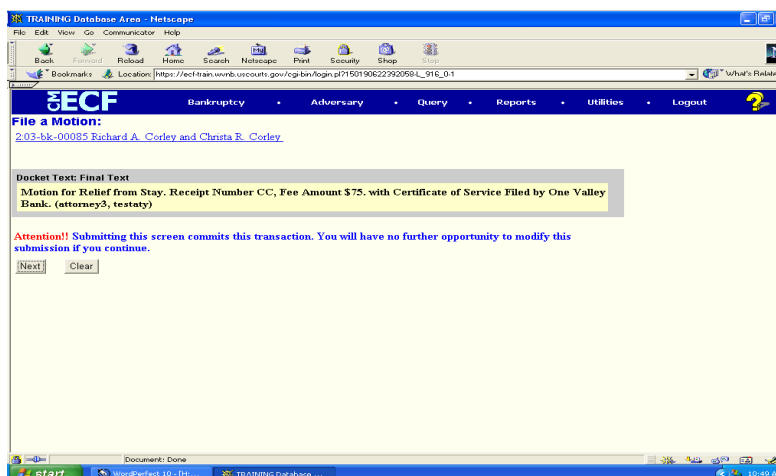
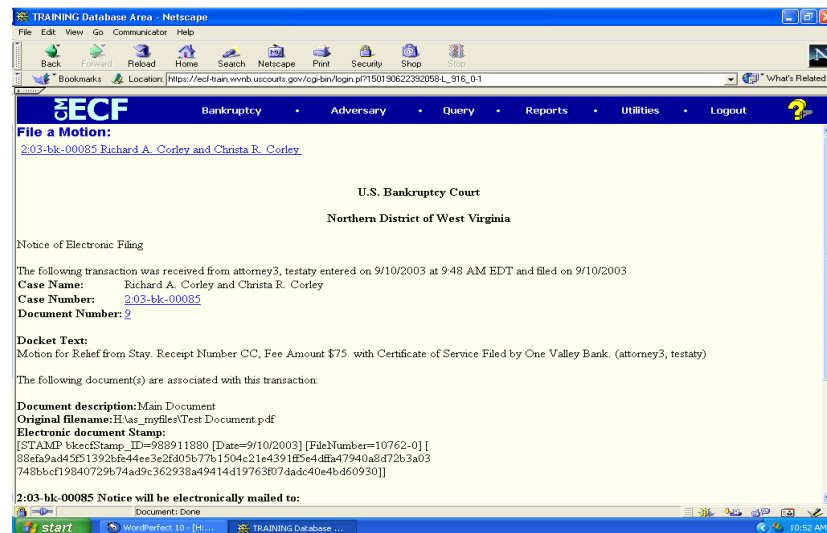


Figure 11

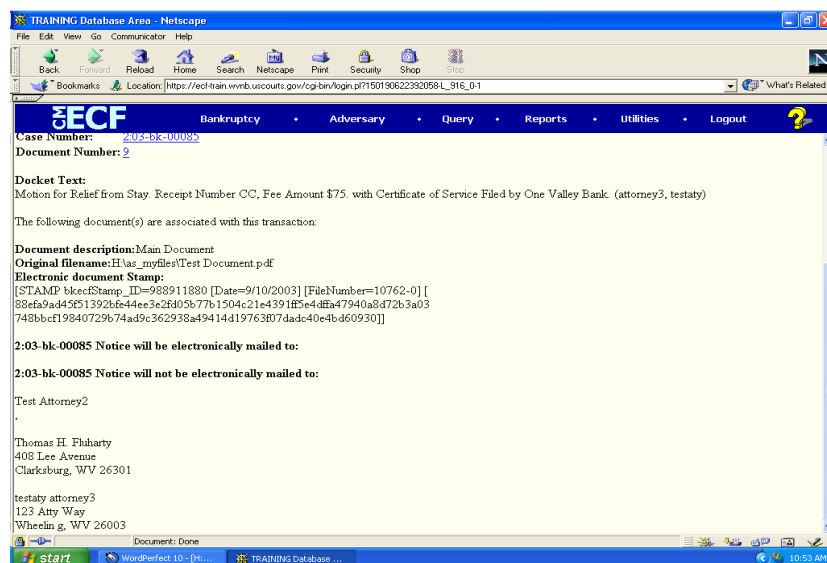
- ◆ Verify the final docket text.
- ◆ If correct, click **[Next]** to continue.
- ◆ If the final docket text is incorrect, you must click on your Browser's **Back** button to correct your entries.

- ◆ To abort or restart the transaction, click on the **Bankruptcy** hyperlink on the Menu Bar.

**STEP 12** The **Notice of Electronic Filing** screen will display showing the essential data for this filing. Scroll down to view the entire receipt. (See Figures 12a and 12b.)



**Figure 12a**



**Figure 12b**

- ◆ The notice will include the following information:
  - ◆ Who filed the document
  - ◆ Date and time
  - ◆ Case name
  - ◆ Case number
  - ◆ Document number
  - ◆ Original filename (pdf)
  - ◆ Electronic document stamp
  - ◆ Electronic mail recipients and manual notice lists

# Motion for Compensation *For Attorneys*

This process will demonstrate the steps to file a motion for compensation in the CM/ECF system.

**STEP 1** Click on the Bankruptcy hyperlink on the CM/ECF Main Menu Bar. (See Figure 1.)



Figure 1

**STEP 2** The **BANKRUPTCY EVENTS** screen displays. (See Figure 2.)

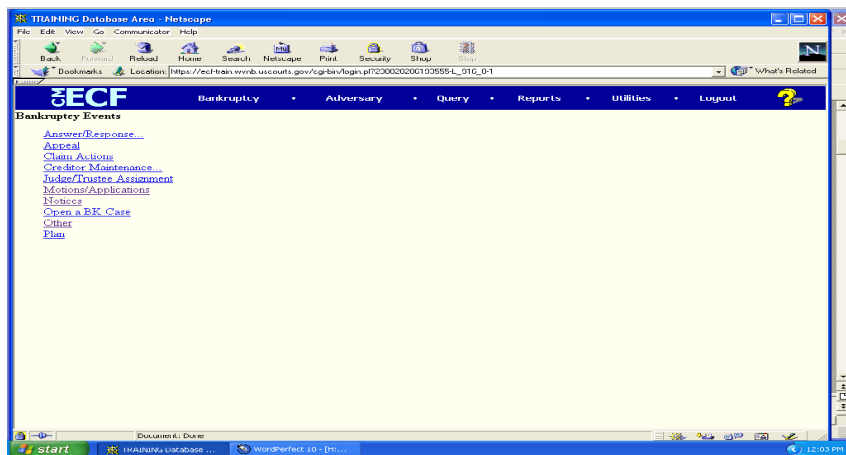
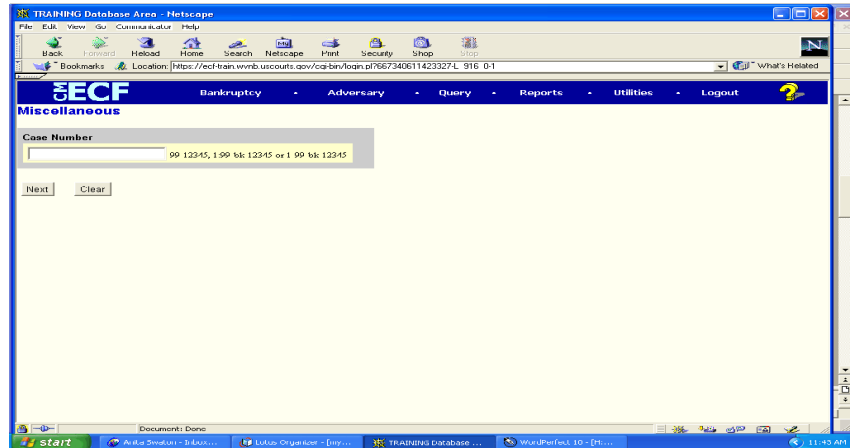


Figure 2

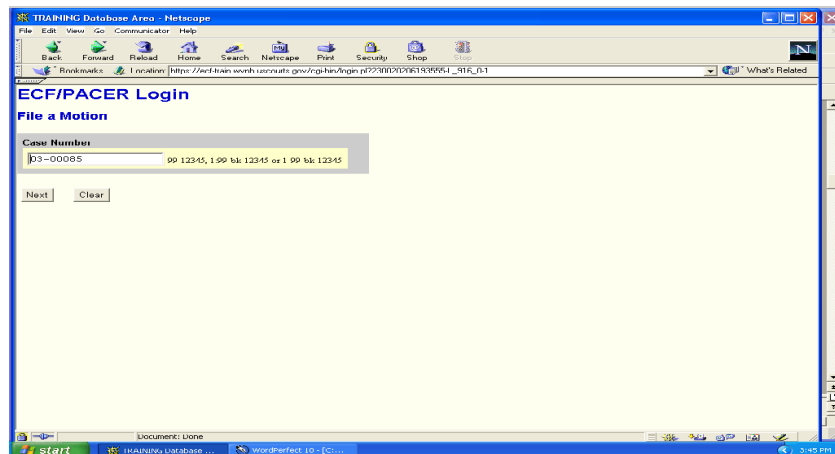
- ◆ Click the Motions/Applications hyperlink.

**STEP 3** The **CASE NUMBER** screen displays. (See Figure 3a.)



**Figure 3a**

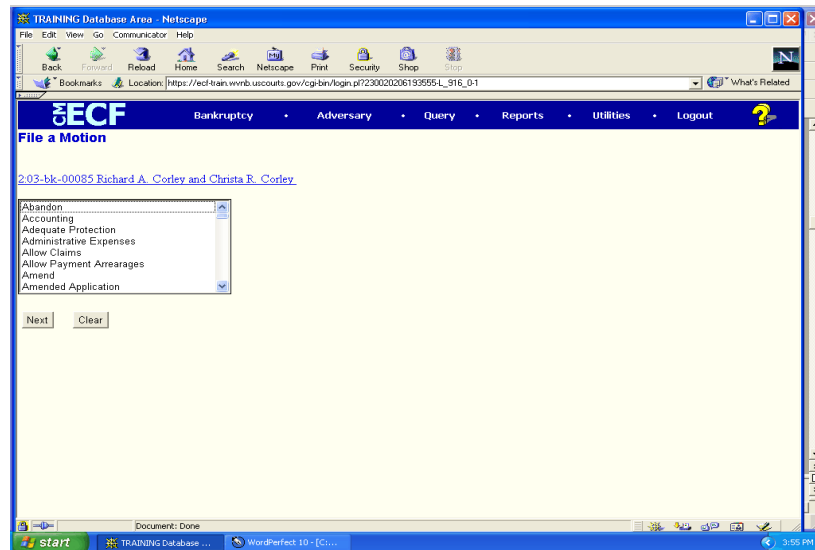
- ◆ Enter the case number. (See Figure 3b.)



**Figure 3b**

- ◆ Click **[Next]** to continue.

**STEP 4** The **File a Motion** screen displays. (See Figure 4a.)

**Figure 4a**

- ◆ Verify the case name and case number that are displayed.
- ◆ If the case name and number are incorrect, click the browser **[Back]** button to re-enter the case number.
- ◆ If the system prompts that you have entered an invalid case number, click the browser **[Back]** button to try again.
- ◆ Using the up and down arrows to the right of the box, scroll the options to highlight the type of document being filed. In this lesson, select Compensation. **(See Figure 4b)**

**NOTE:** You may also type the first letter of a relief (in this case 'C') to immediately move to the list of reliefs that begin with a particular letter.

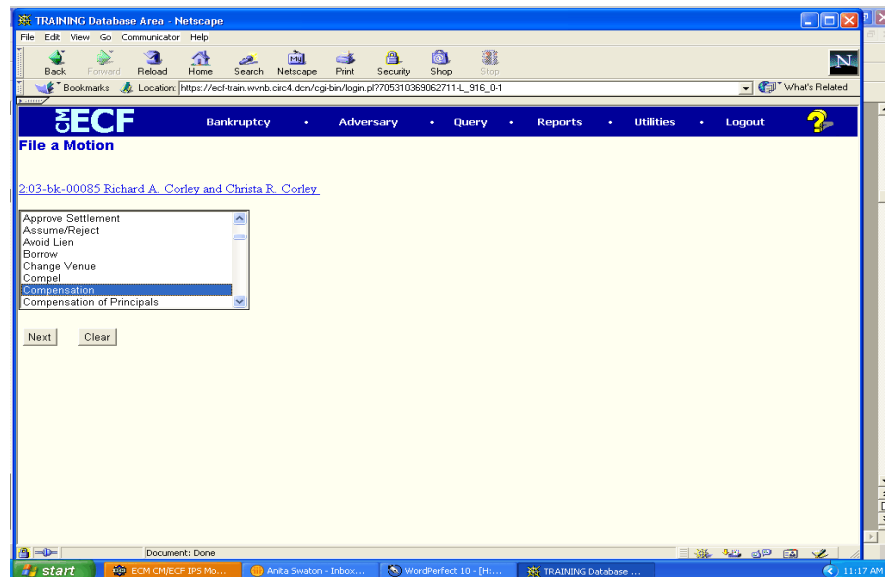


Figure 4b

- ◆ Click **[Next]** to continue.

**STEP 5** The Joint Filing With Other Attorneys screen displays. (See Figure 5.)

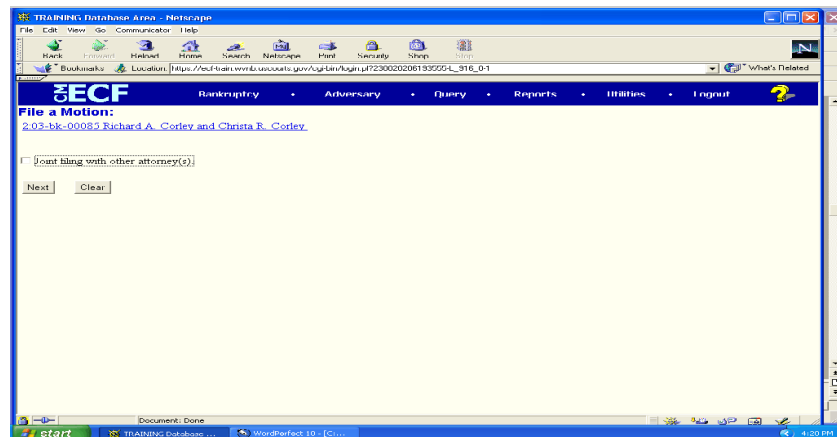
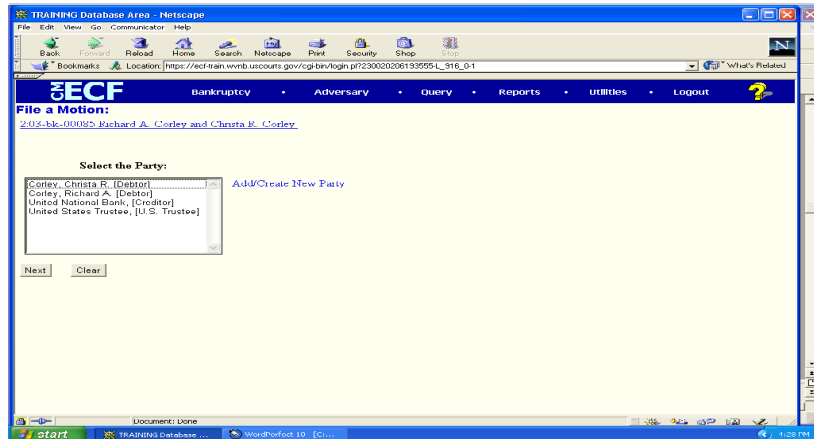


Figure 5

- ◆ If this filing is joint with another attorney, click to place a check in the Joint Filing box. If this is not a joint filing, no action is required.

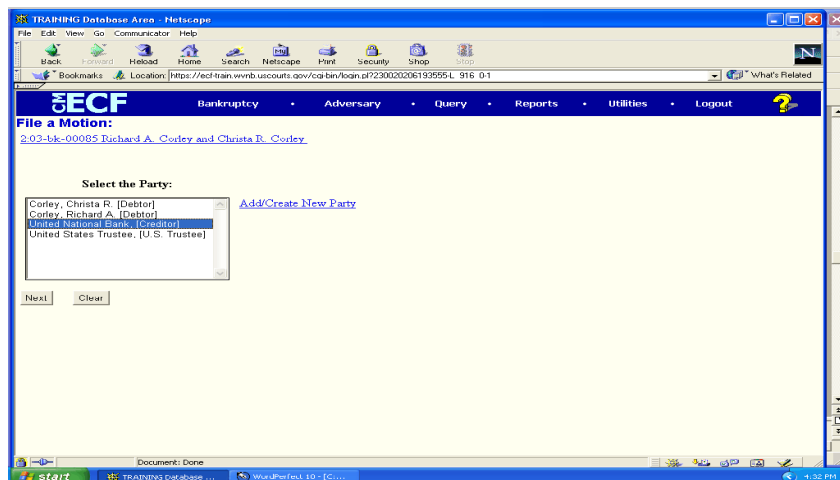
- ◆ Click **[Next]** to continue.

**STEP 6** The **Select the Party** screen displays. (See Figure 6a.)



**Figure 6a**

- ◆ Click the down arrow to scroll the **Select the Party** box to locate the party filer (whom you are representing) **IF YOU ARE SEEKING COMPENSATION**. If you are seeking compensation for a party **OTHER THAN WHOM YOU ARE REPRESENTING**, i.e., accountant, appraiser, consultant, you would select or add the entity on this screen.
- ◆ Click to highlight and select the appropriate party as explained above. (See Figure 6b.)



**Figure 6b**

- ◆ Then click **[Next]**.

- ◆ If the party filer does **not** appear in the **Select the Party** box, Click on **Add/Create New Party**.
- ◆ The **Search for a Party** screen displays. (See Figure 6c.)

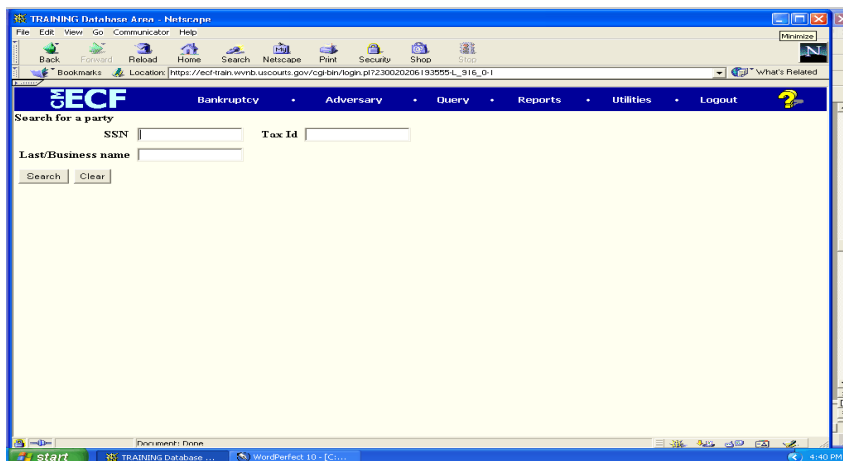


Figure 6c

- ◆ On **Search for a Party** screen, enter the name of the party you represent in the **Last/Business Name** field. (See Figure 6d.)

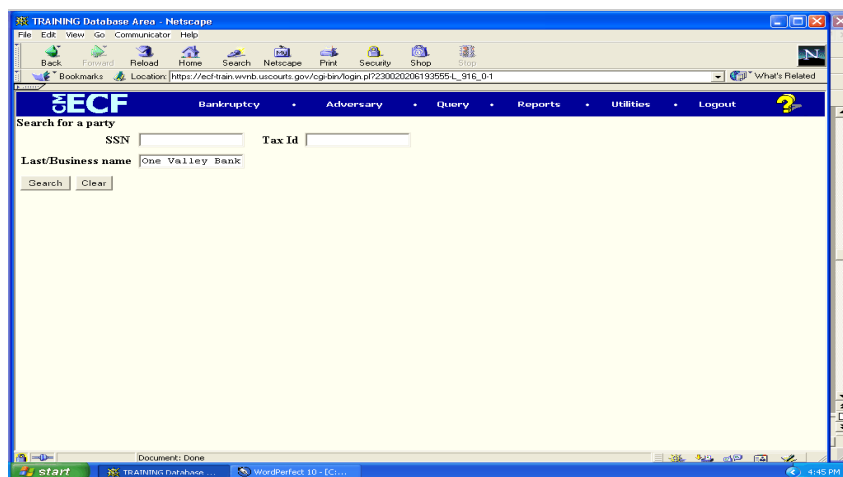


Figure 6d

- ◆ Then click **Search**.
- ◆ If the name of the party you are representing is not contained in the court's database for this case, you will receive the following message: **No person found**. Select **Create new party**. (See Figure 6e.)

Figure 6e

- ◆ Complete the **Party Information** screen. The party's name will be displayed. Enter address by using Address 1, Address 2 and Address 3 fields and City, State and Zip fields. The **Pro Se** field should remain **No** as you are filing the motion as the attorney.
- ◆ Select Appropriate **Role** type. This may be **Creditor**, **Accountant**, **Appraiser**, etc. (See Figure 6f.)

Figure 6f

- ◆ Then click **Submit**.

- ◆ The **Select the Party** screen will display. Select the entity you added. (See Figure 6g.)
- ◆ Then click **[Next]**.

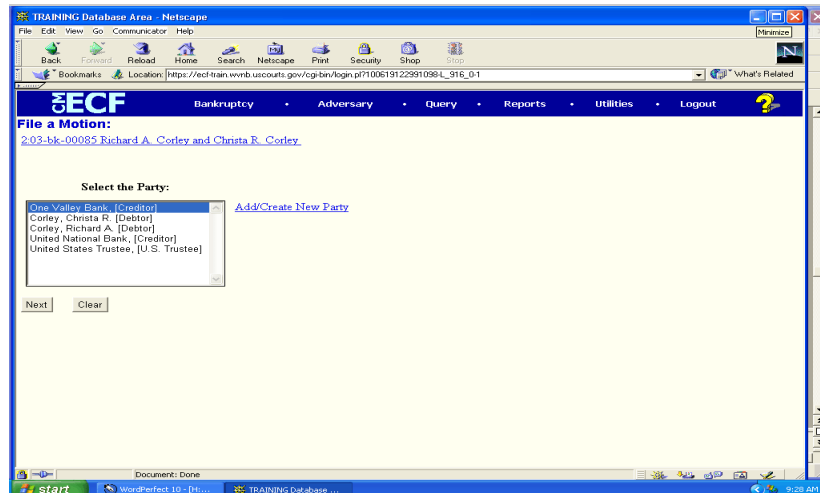


Figure 6g

- ◆ The **Attorney/Party Association** screen will display. Create your association with this party by clicking in the box **ONLY IF YOU ARE COUNSEL FOR THE ENTITY SEEKING COMPENSATION**. (See Figure 6h.)
- ◆ Then click **[Next]**.

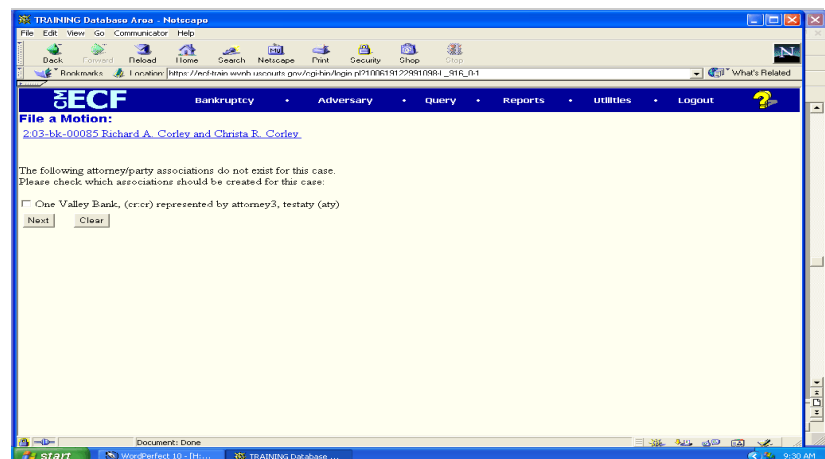
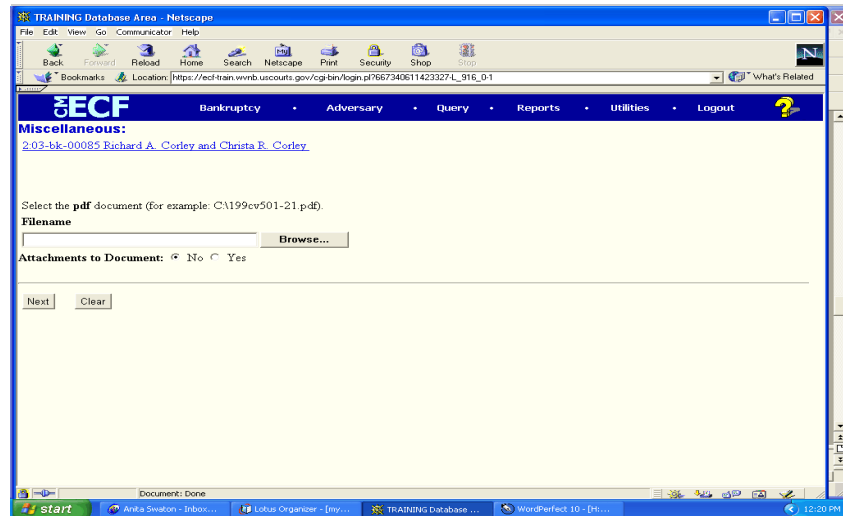


Figure 6h

**STEP 7** The **Select the pdf document** screen displays. (See Figure 7a.)



**Figure 7a**

- ◆ Click **[Browse]**, then navigate to the directory where the PDF file is located. Double-click the PDF file to select it.
- ◆ In the **File Upload** screen, change **Files of type:** to **All Files(\*.\*)**.

**NOTE:** If you wish to view the image before selecting to be sure you have chosen the correct file, before double-clicking, first right click on the highlighted filename and click on **open**. You

can

view the image in Adobe Acrobat, then close Adobe Acrobat

when

you have finished viewing the image.

**(See Figure 7b.)**

- ◆ The **Attachments to Document** option defaults to **No**. If you have attachments to this document, click the **Yes** radio button to indicate there are attachments. (Refer to module: *Attachments to Documents* for more information.)

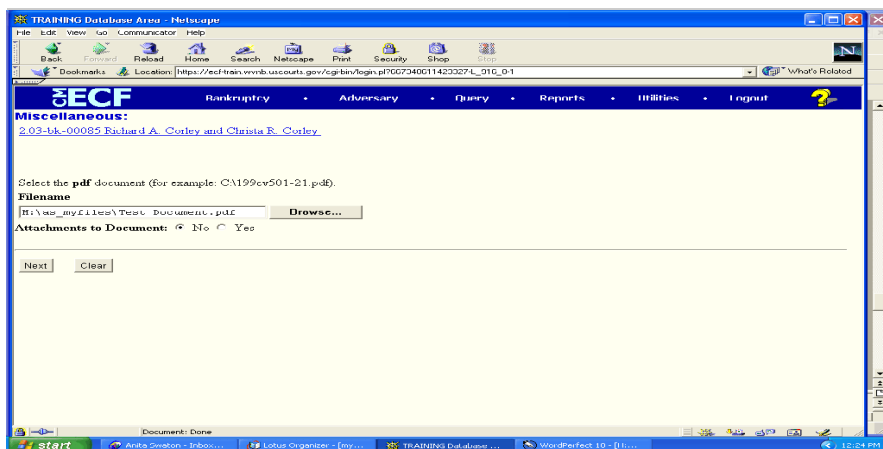


Figure 7b

- ◆ Click **[Next]** to continue.

#### STEP 8 (See Figure 8.)

- ◆ Enter **y** or **n** on this screen if a **Certificate of Service** is being filed with the motion.
- ◆ Click **[Next]** to continue.

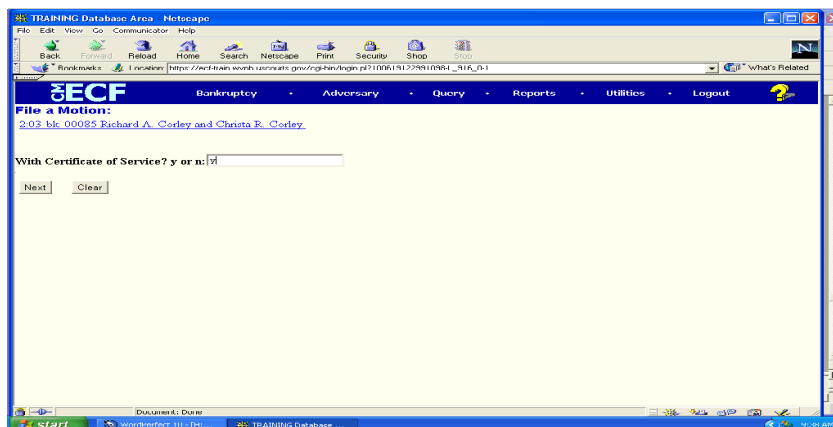


Figure 8

- ◆ Click **[Next]** after verifying the name and bankruptcy number.

**STEP 9** The following screen displays. (See Figure 9a.)

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Bookmarks Location: [https://ecf-train.wvnb.circ4.dcn/cgi-bin/login.pl?0531036062711-4\\_916\\_0-1](https://ecf-train.wvnb.circ4.dcn/cgi-bin/login.pl?0531036062711-4_916_0-1) What's Related

**ECF** Bankruptcy Adversary Query Reports Utilities Logout ?

**File a Motion:**  
[2:03-bk-00085 Richard A. Corley and Christa R. Corley](#)

Applicant: student0 Type: Accountant

☒ Filer

From: To:

Fee request \$: Expense request \$:

Applicant: One Valley Bank Type: Accountant

☐ Filer

From: To:

Fee request \$: Expense request \$:

Next Clear

Document: Done

start ECM CRECF IPS No... Anita Swaton - Inbo... WordPerfect 10 - [t... TRAINING Database ... 12:09 PM

**Figure 9a**

- ◆ You will complete only one portion of this screen. **If you are seeking compensation**, enter the information in the upper half of the screen.

**If you are seeking compensation for another party (such as an accountant, appraiser, auctioneer, consultant, etc.),** you will enter the information in the lower half of the screen

- ◆ Select the Filer
- ◆ Type - Select applicable type such as Creditor's Attorney, Debtor's Attorney.
- ◆ From - Complete date
- ◆ To - Complete date
- ◆ Fee request \$ - Enter amount
- ◆ Expense request\$ - Enter amount

(See Figure 9b.)

TRAINING Database Area - Netscape

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**ECF** Bankruptcy Adversary Query Reports Utilities Logout

**File a Motion:**  
[2:03-bk-00085 Richard A. Corley and Christa R. Corley](#)

Applicant: student0 Type: Creditor's Attorney

☒ Filer

From: 10/15/2003 To: 01/31/2004

Fee request \$: 700.00 Expense request \$: 100.00

Applicant: One Valley Bank Type: Accountant

☐ Filer

From: To:

Fee request \$: 0. Expense request \$: 0.

Next Clear

Figure 9b

- ◆ Click **[Next]** to continue.
- ◆ A message may display indicating that you did not enter any fees or expenses in the other section of the screen. Click **[OK]** twice. (See Figure 9c.)

TRAINING Database Area - Netscape

File Edit View Go Communicator Help

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Bookmarks Location [https://ecf-train.wvnb.circ4.dcn/cgi-bin/login.pl?7053103690627114\\_916\\_01](https://ecf-train.wvnb.circ4.dcn/cgi-bin/login.pl?7053103690627114_916_01) What's Related

**ECF** Bankruptcy Adversary Query Reports Utilities Logout

**File a Motion:**  
[2:03-bk-00085 Richard A. Corley and Christa R. Corley](#)

Applicant: student0 Type: Creditor's Attorney

☒ Filer

From: 10/15/2003 To: 01/31/2004

Fee request \$: 700.00 Expense request \$: 100.00

Applicant: One Valley Bank Type: Accountant

☐ Filer

From: To:

Fee request \$: Expense request \$:

Next Clear

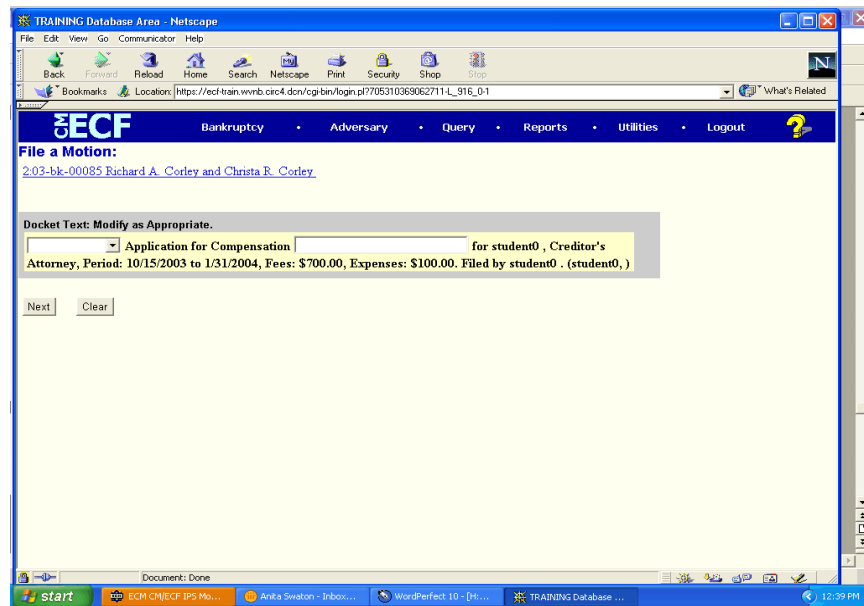
**JavaScript Application**

You have not entered an Amount for the Fee, for applicant One Valley Bank, are you sure you want to continue?

OK Cancel

Figure 9c

**STEP 10**      The **Docket Text: Modify as Appropriate** screen displays. (See Figure 10a.)



**Figure 10a**

- ◆ You may insert additional text and/or add a prefix to your docket entry. Click on the down arrow in the white box to select an appropriate prefix if applicable. (See Figure 10b.)

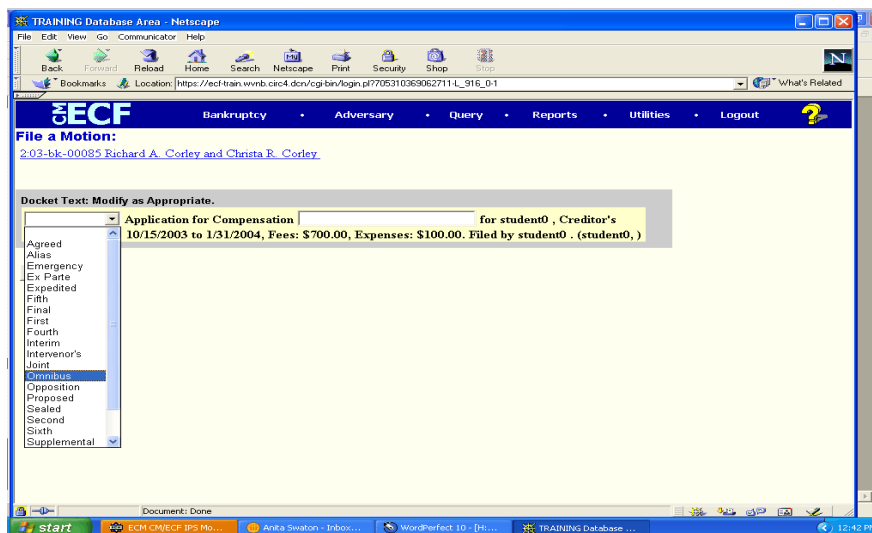


Figure 10b

- ◆ Click **[Next]** to continue.

**STEP 11** The **Docket Text: Final Text** screen displays. (See Figure 11.) This is your **last** opportunity to make corrections to your entry.

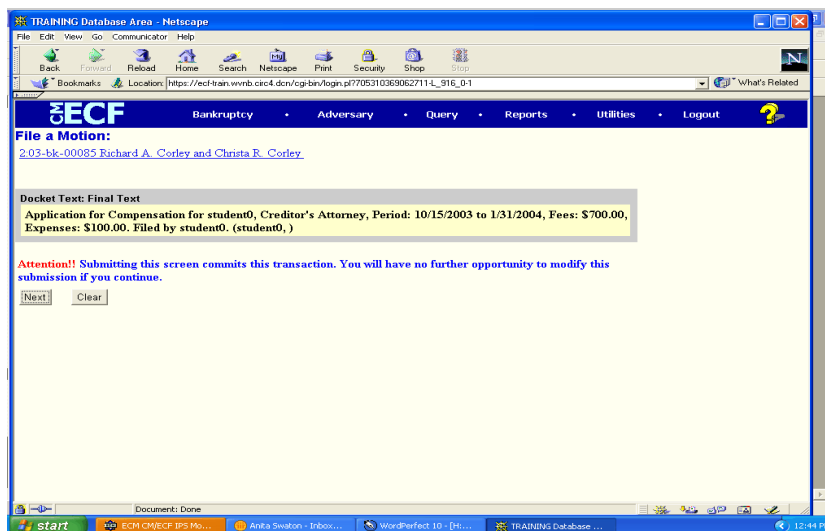
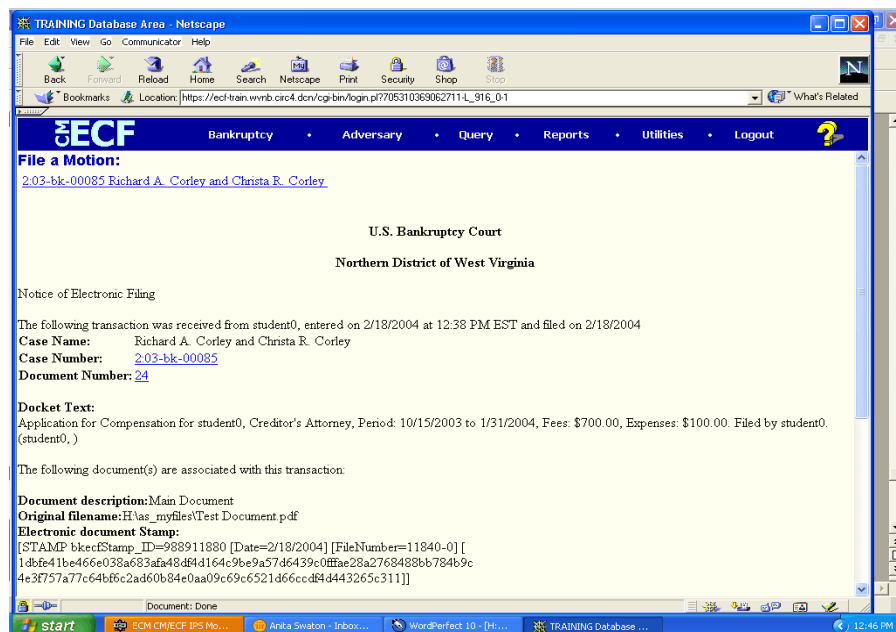


Figure 11

- ◆ Verify the final docket text.

- ◆ If correct, click **[Next]** to continue.
- ◆ If the final docket text is incorrect, you must click on your Browser's **Back** button to correct your entries.
- ◆ To abort or restart the transaction, click on the **Bankruptcy** hyperlink on the Menu Bar.

**STEP 12** The **Notice of Electronic Filing** screen will display showing the essential data for this filing. Scroll down to view the entire receipt. **(See Figures 12a and 12b.)**



**Figure 12a**

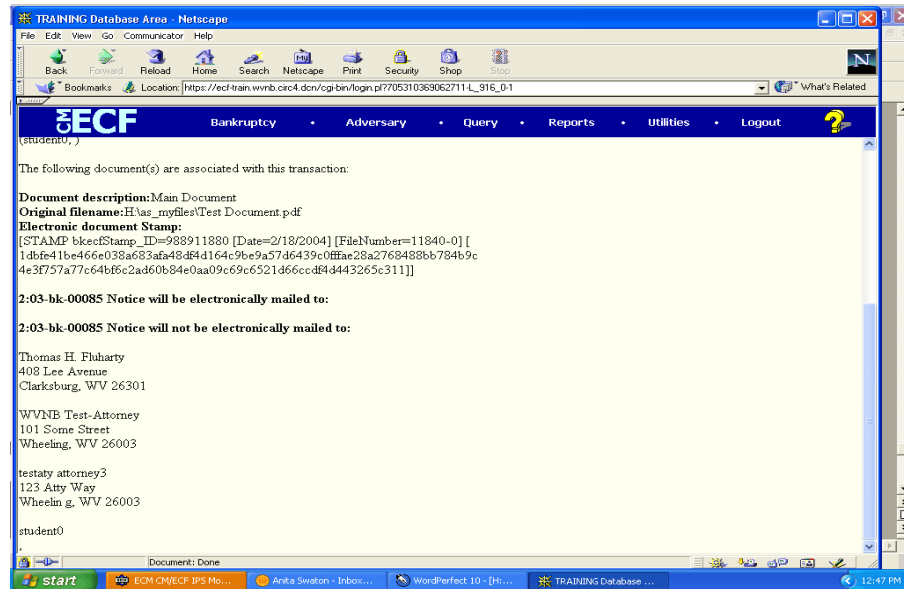


Figure 12b

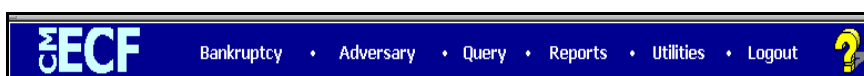
- ◆ The notice will include the following information:
  - ◆ Who filed the document
  - ◆ Date and time
  - ◆ Case name
  - ◆ Case number
  - ◆ Document number
  - ◆ Original filename (pdf)
  - ◆ Electronic document stamp
  - ◆ Electronic mail recipients and manual notice lists



## Multi-Part Motions

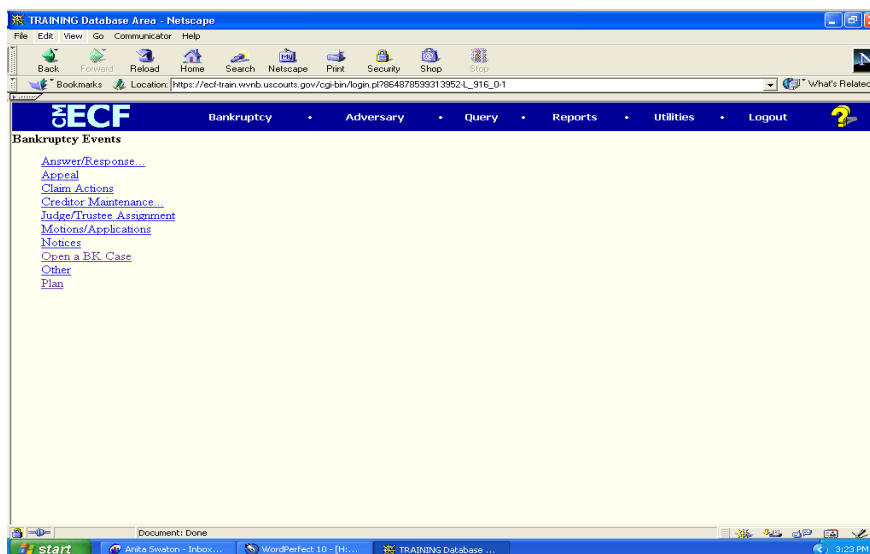
This procedure explains how to docket a two-part motion. The example illustrated is a Motion for Relief from Stay and Adequate Protection.

- STEP 1** Click the Bankruptcy hypertext link on the CM/ECF Main Menu. (See Figure 1.)



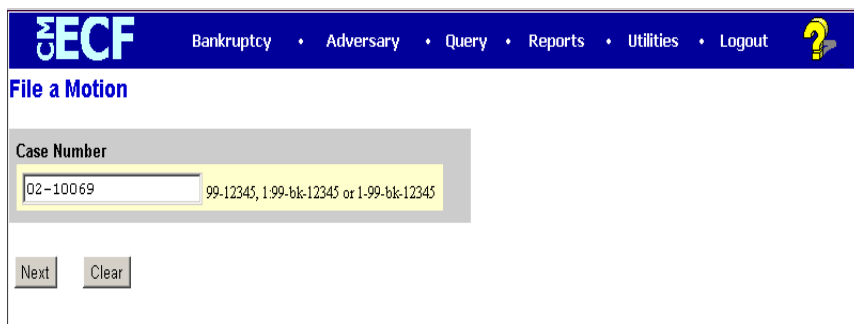
**Figure 1**

- STEP 2** The **BANKRUPTCY EVENTS** screen will display. (See Figure 2.)



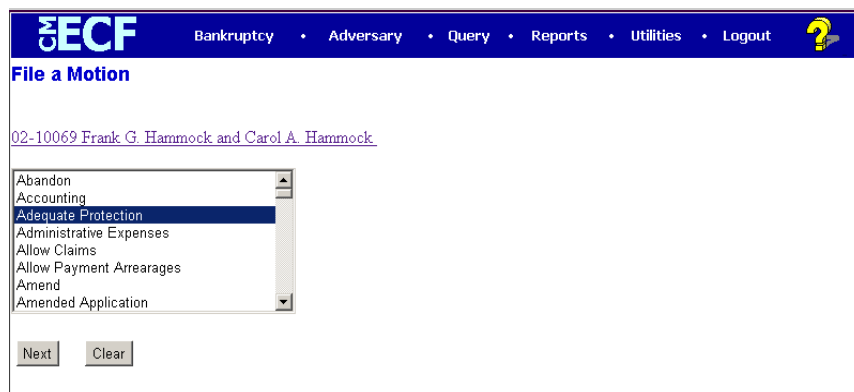
**Figure 2**

- ◆ Click the Motions/Applications hyperlink.


**STEP 3** The **CASE NUMBER** screen displays. (See Figure 3.)The screenshot shows the ECF 'File a Motion' screen. At the top is a blue navigation bar with the ECF logo and links for Bankruptcy, Adversary, Query, Reports, Utilities, and Logout, along with a help icon. Below the navigation bar, the title 'File a Motion' is displayed. The main content area has a 'Case Number' label above a text input field containing '02-10069'. To the right of the input field is a yellow tooltip box containing the text '99-12345, 1-99-bk-12345 or 1-99-bk-12345'. Below the input field are 'Next' and 'Clear' buttons.**Figure 3**

- ◆ Enter the case number, including the hyphen.
- ◆ Click **[Next]**.

**NOTE:** You may use the browser **[Back]** button at any time during this process to verify former screens until the final submission.

**STEP 4** The **MOTION EVENTS** screen displays next. (See Figure 4.)The screenshot shows the ECF 'File a Motion' screen. The navigation bar and title are the same as in Figure 3. Below the title, the case number '02-10069' is followed by the case name 'Frank G. Hammock and Carol A. Hammock'. A dropdown menu is open, showing a list of motion events: Abandon, Accounting, Adequate Protection (highlighted), Administrative Expenses, Allow Claims, Allow Payment Arrearages, Amend, and Amended Application. Below the dropdown menu are 'Next' and 'Clear' buttons.**Figure 4**

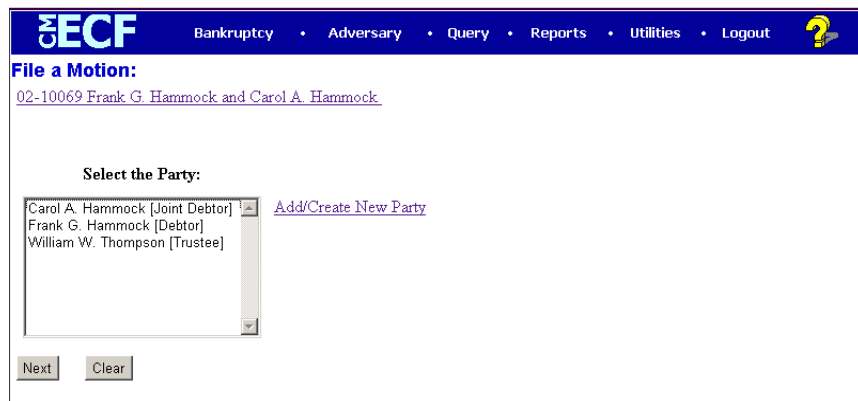
- ◆ Click to highlight Adequate Protection. Keeping the **[Ctrl]** key depressed, scroll and highlight Relief From Stay. Release the **[Ctrl]** key. There are now two reliefs identified and selected for this motion.
- ◆ Click **[Next]**.

**STEP 5** The **JOINT FILING** screen displays. (See Figure 5.)**Figure 5**

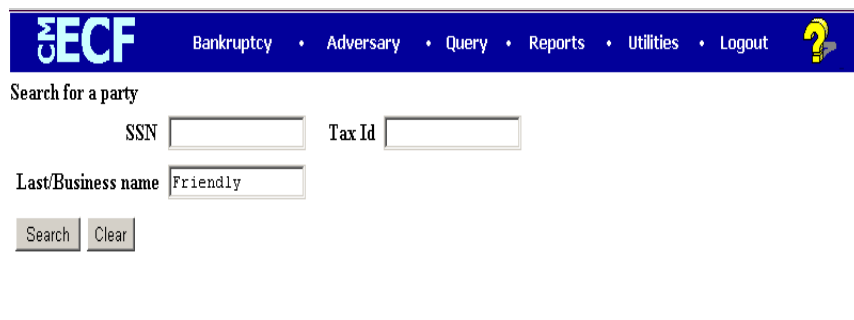
- ◆ This screen is only used if another attorney is joining in a filing, do not check this box.

If this were a joint filing with another attorney(s) you would check the box and after selecting **[Next]** you would be presented with a pick list of attorneys on the case to select as joint filers.

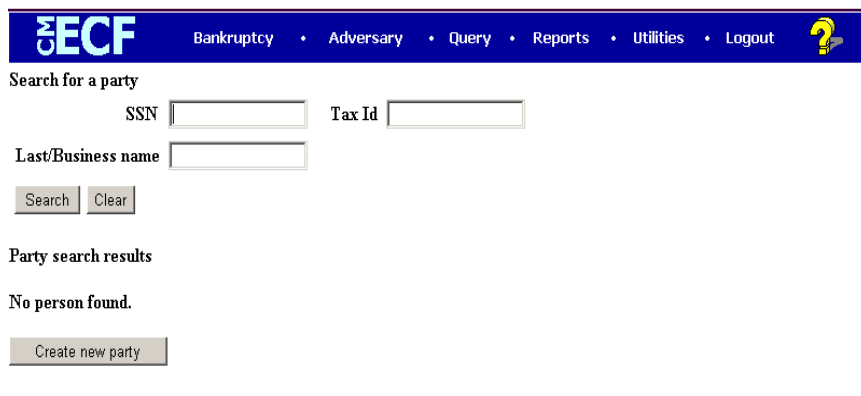
- ◆ Click **[Next]**.

**STEP 6** The **SELECT PARTY** screen displays. (See Figure 6.)**Figure 6**

- ◆ Since the party, Friendly Finance, is currently not a party in this case, they are not listed and must be added. Click the Add/Create New Party hyperlink.

**STEP 7** The **PARTY SEARCH** screen appears. (See Figure 7.)**Figure 7**

- ◆ Enter the first part of the business name and click **[Search]**.

**STEP 8** If there are no matches, the system will return a **No Person Found** message. Make sure your search criteria is accurate. If the party is not found on your first try, use different criteria and/or wildcards. (See Figure 8a.)**Figure 8a**

- ◆ Since the party is not already on the database, proceed to add the creditor, Friendly Finance. Click **[Create New Party]**.

**NOTE:** Your name search may find more than one record having the same name as shown in **Figure 8b**. Clicking on each of the names will display a window showing the party's address information for verification.

If none of the addresses are correct for this party, you can either 1.) modify the address (for this case only) on the following PARTY INFORMATION screen, or 2.) click on the **[Create new party]** button to add a new person record with this address.

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Bookmarks Location: https://atrain.aotx.uscourts.gov/cgi-bin/login.pl?453090566157441-L\_255\_0-1

What's Related

atrain attrain-PACER attrain astudent1 bkiv2 CM/ECF INTERNAL CMECF RESOURCE

**ECF** Bankruptcy Adversary Query Reports Utilities Logout

Search for a party

SSN  Tax ID

Last/Business name

Search Clear

Party search results

American Express, American Express,

Select name from list Create new party

Person Address - Netscape

American Express  
3091 Sizemore Rd.  
San Antonio, TX 78555

Figure 8b

**STEP 9** The **PARTY INFORMATION** screen displays. (See Figure 9.)

**ECF** Bankruptcy Adversary Query Reports Utilities Logout

Party Information

Last name  Friendly Finance First name

Middle name  Generation  Title

SSN  222-11-1234 Tax ID

Office  Address 1

Address 2  Address 3

City  State  Zip

County  Peachtree Country

Phone  Fax

E-mail

ProSe  no Role  Creditor (cr.cr)

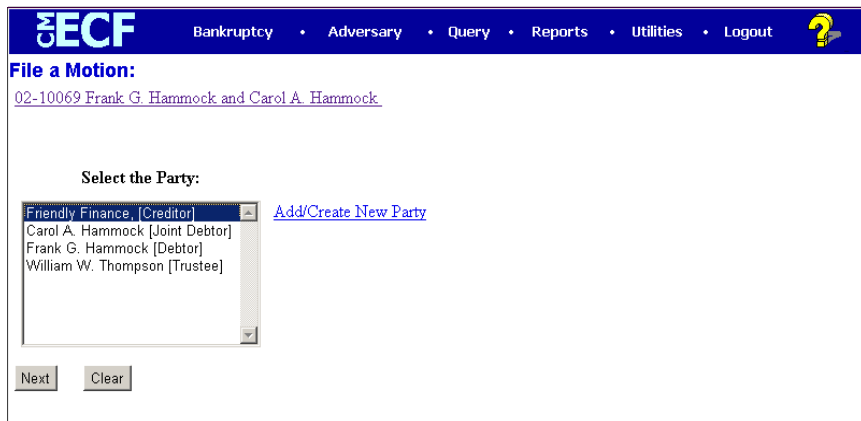
Party text

Submit Cancel Clear

Figure 9

- ◆ Enter creditor **Name** information in the appropriate boxes.
- ◆ Leave *pro se* as **no**.
- ◆ Expand the **Role Type** selection pick list by clicking on the down arrow ▼ and select Creditor.
- ◆ Enter further descriptive text for the creditor in the Party Text field, if appropriate. (A Connecticut Corporation, Guardian of the State, etc.)
- ◆ It is not necessary to add yourself as counsel for the party. Your login will furnish your attorney information to the system.
- ◆ Click **[Submit]**.

**STEP 10** The **SELECT PARTY** screen appears again. (See Figure 10.)



The screenshot shows the ECF system interface. At the top is a blue navigation bar with the ECF logo and links for Bankruptcy, Adversary, Query, Reports, Utilities, and Logout. Below the navigation bar, the page title is "File a Motion:" followed by a case link "02-10069 Frank G. Hammock and Carol A. Hammock". The main content area is titled "Select the Party:". It features a dropdown menu with the following options: "Friendly Finance, [Creditor]", "Carol A. Hammock [Joint Debtor]", "Frank G. Hammock [Debtor]", and "William W. Thompson [Trustee]". The "Friendly Finance, [Creditor]" option is highlighted. To the right of the dropdown is a link "Add/Create New Party". At the bottom of the form are two buttons: "Next" and "Clear".

**Figure 10**

- ◆ The new creditor's name, Friendly Finance, is highlighted.
- ◆ Click **[Next]** to continue.

**STEP 11** The **ATTORNEY/PARTY ASSOCIATIONS** screen appears. (See Figure 11.)



The screenshot shows the ECF system interface. At the top is a blue navigation bar with the ECF logo and links for Bankruptcy, Adversary, Query, Reports, Utilities, and Logout. Below the navigation bar, the page title is "File a Motion:" followed by a case link "02-10069 Frank G. Hammock and Carol A. Hammock". The main content area contains the text: "The following attorney/party associations do not exist for this case. Please check which associations should be created for this case:". Below this text is a checkbox labeled "Friendly Finance, (cr.cr) represented by Walker, Heather (aty)". The checkbox is checked. At the bottom of the form are two buttons: "Next" and "Clear".

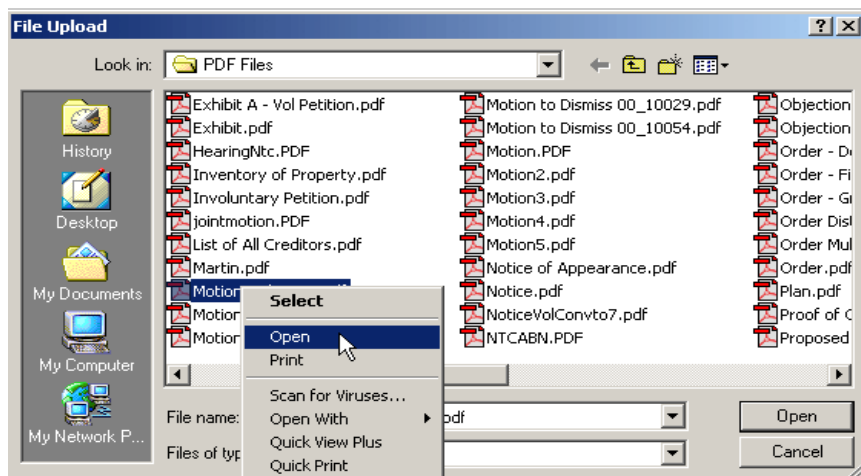
**Figure 11**

- ◆ Click the box to establish the association between you and Friendly Finance in this case.
- ◆ Click **[Next]**.

**STEP 12** The **PDF DOCUMENT SELECTION** screen displays.  
(See Figure 12a.)

**Figure 12a**

- ◆ Click **[Browse]**, then navigate to the directory where the appropriate PDF file is located.
- In the **File Upload** window, change **Files of type:** to **All Files (\*.\*)**
- To make certain you are about to associate the correct PDF file for this entry, right click on the filename with your mouse and select **Open**. (See Figure 12b.)



**Figure 12b**

- ◆ This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct.
- ◆ Close or minimize the Adobe application and if that is the correct file, click Open on the File Upload dialogue box. (See Figure 12c.)

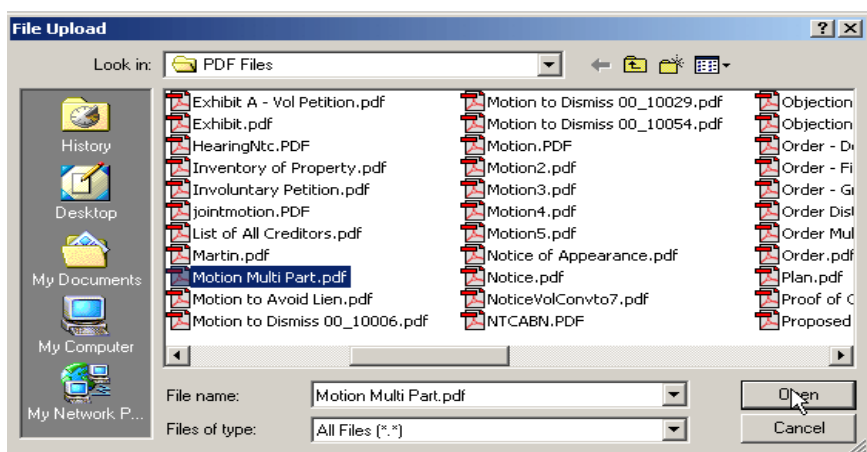


Figure 12c

- ◆ The path and name of the selected PDF file is placed in the **Filename** Box. The file will be associated with the current event and a hyperlink will be created to it. (See Figure 12d.)

Figure 12d

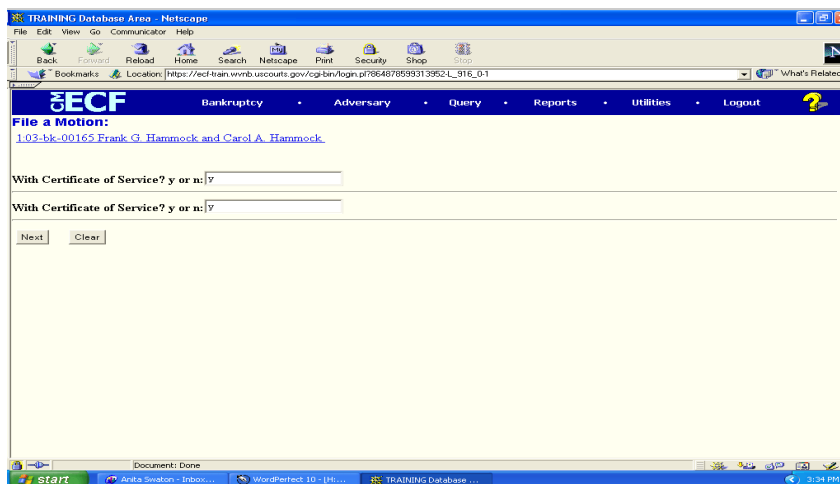
- ◆ The **Attachments to Document** option defaults to **No**. If you have attachments to this document, click the **Yes** radio button to indicate there are attachments. (Refer to module: *Attachments to Documents* for more information.)

- ◆ Click **[Next]**.

**STEP 13** The **With Certificate of Service?** screen displays. (See Figure 13.)

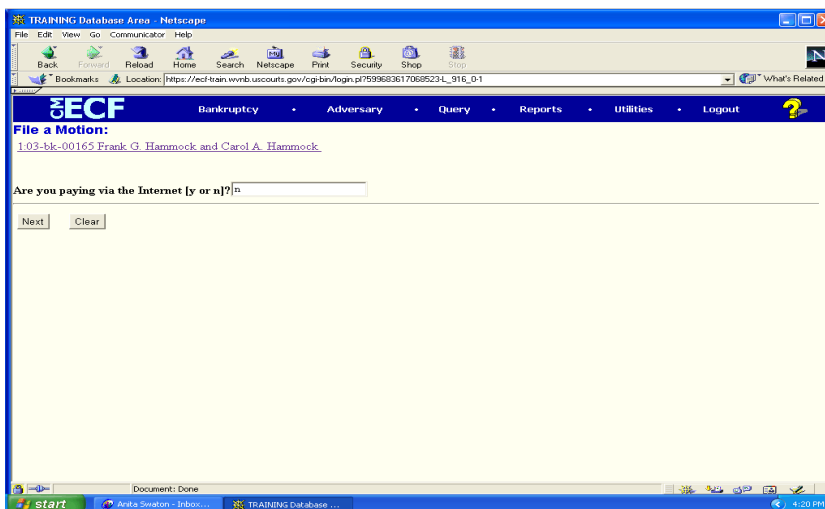
- ◆ Insert **y** in both boxes. There are two boxes because a multi-part motion is being filed.

- ◆ Click **[Next]** to continue.



**Figure 13**

- STEP 14** Since a part of this multi-part motion is Relief from Stay requiring a filing fee, the screen shown below appears. (See Figure 14.)



**Figure 14**

- ◆ Enter **n** and Click **[Next]** to continue.

**STEP 15** The following screen displays. (See Figure 15.)

TRAINING Database Area - Netscape

File Edit View Go Communicator Help

Back Forward Reload Home Search Netscape Print Security Shop Stop

Bookmarks Location: https://ecf-train.wvnb.uscourts.gov/cgi-bin/login.pl?5996836170685234\_916\_0-1

What's Related

**ECF** Bankruptcy Adversary Query Reports Utilities Logout

**File a Motion:**

[1:03-bk-00165 Frank G. Hammock and Carol A. Hammock](#)

Please Enter: A Receipt Number or CC for Credit Card or O for Other Payment.

Receipt #:  Fee: \$75

Next Clear

Document: Done

start Anita Swaton - Inbox... TRAINING Database ... WordPerfect 10 - [Hi... 4:23 PM

**Figure 15**

- ◆ Enter **CC** for credit card.
- ◆ Click **[Next]** to continue.

**Step 16** The **MODIFY DOCKET TEXT** screen appears. (See Figure 16.)

TRAINING Database Area - Netscape

File Edit View Go Communicator Help

Back Forward Reload Home Search Netscape Print Security Shop Stop

Bookmarks Location: https://ecf-train.wvnb.uscourts.gov/cgi-bin/login.pl?5996836170685234\_916\_0-1

What's Related

**ECF** Bankruptcy Adversary Query Reports Utilities Logout

**File a Motion:**

[1:03-bk-00165 Frank G. Hammock and Carol A. Hammock](#)

**Docket Text: Modify as Appropriate.**

Motion for Adequate Protection  Motion for Relief from Stay  Receipt Number CC, Fee Amount \$75. Filed by Friendly Finance (attorney3, testaty)

Next Clear

Document: Done

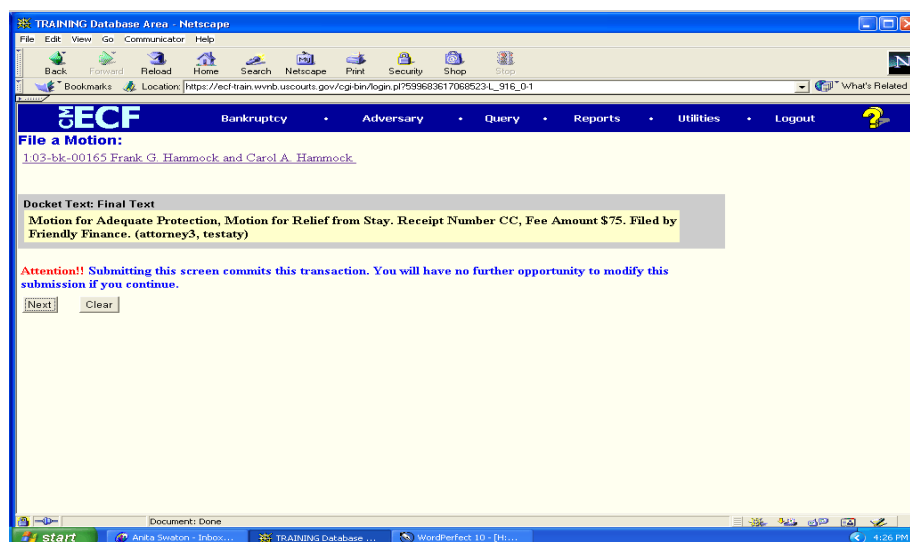
start Anita Swaton - Inbox... TRAINING Database ... WordPerfect 10 - [Hi... 4:25 PM

**Figure 16**

If appropriate, choose a prefix from the **Prefix Text** pick list

- ◆ In either or both of the text boxes, add additional text for the motions you are filing, if applicable.
- ◆ Click **[Next]** to continue.

**STEP 17** The **FINAL DOCKET TEXT** screen displays. (See Figure 17.)



**Figure 17**

- ◆ Carefully verify the final docket text. This is your last chance to change this entry before addition to the case. If correct, click **[Next]**.
- ◆ If the final docket text is incorrect:
  - Click the browser **[Back]** button to find the screen to be modified.
  - To abort or restart the transaction, click the Bankruptcy hyperlink on the **Menu Bar**.

**STEP 18** The **NOTICE OF ELECTRONIC FILING SCREEN** displays. (See Figure 18.)

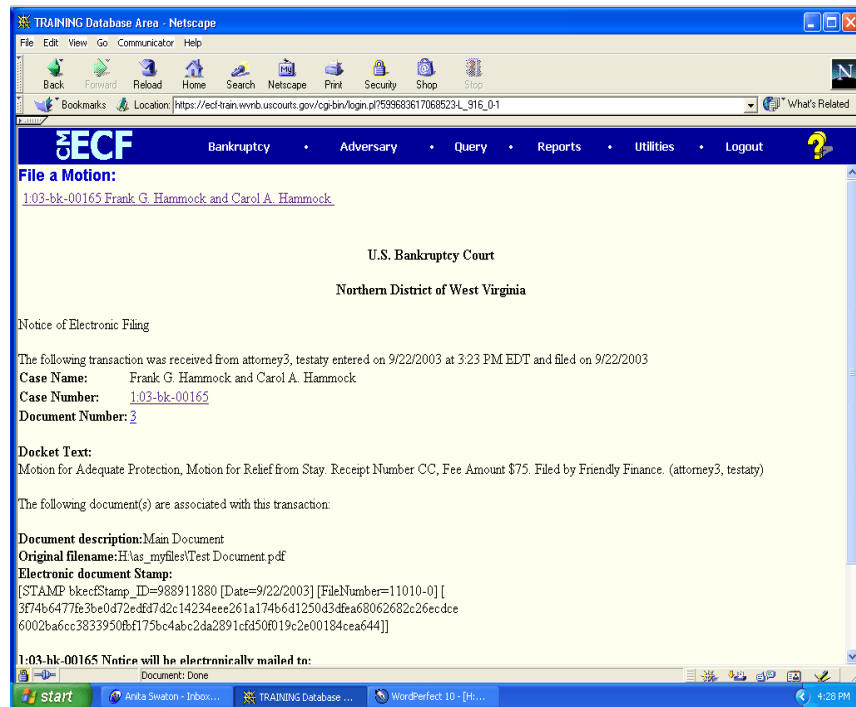


Figure 18

- ◆ Clicking on the case number hyperlink on the Notice of Electronic Filing will present the **PACER** login screen.
- ◆ Clicking on the document number hyperlink will present the PACER login screen.
- ◆ To print a copy of this receipt click the browser **[Print]** icon.
- ◆ To save a copy of this receipt, click **[File]** on the browser menu bar and select **Save Frame As**.
- ◆ The **Notice of Electronic Filing** will also be accessible as an option from the docket sheet. However, attorneys and public users will be charged a PACER access fee.

### Notice of Electronic Filing:

Hyperlink to docket sheet

Date and time stamp information

Case Title

Case number hyperlink to docket sheet?

Docket text

- Annotated text in italics
- Text produced from docket event
- Attachment type, description and attachment number which is a hyperlink to the PDF file of the attached document if there is one.

**Associated (PDF) documents:**

Document description:	Defaults to <b>Main Document</b> being docketed.
Original filename:	Filer's full directory path from firm or court's hard drive or network.
Electronic document stamp:	Unique identifying name of the document being filed for security purposes. Key file of the court used for encryption.
Document description:	First <b>attached</b> document's description that was entered on the attachment screen by the filer.
Original filename:	Filer's full directory path from the firm or court's hard drive or network.
Electronic document stamp:	Unique identifying name of the attachment for security purposes. Key file of the court used for encryption

**Notice will be electronically mailed to:**

Any party on the case who has registered their e-mail address with the court will be listed here with their current e-mail address, not their street address.

**Notice will not be electronically mailed to:**

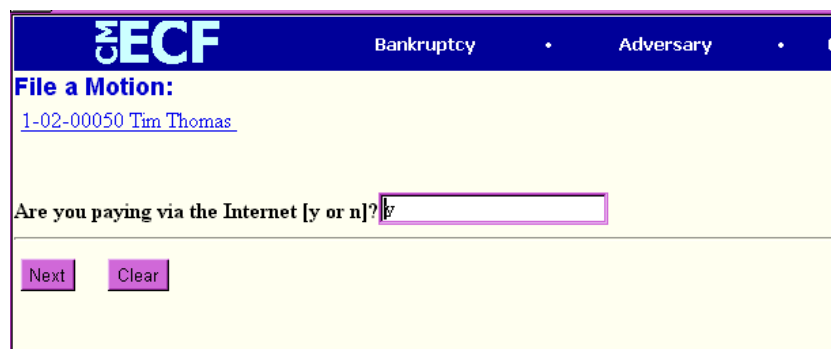
Name and address of other parties on the case who have not furnished their e-mail address with the court.

## Internet Credit Card Module

This Process shows the screens for paying a filing fee via the internet, using a credit card. The Court requires that you have a signed credit card authorization form on file before you will be permitted to use this feature. This feature allows you to defer payment until the end of the day and thereby only charge your credit card once. **You must settle payment by 8:00pm each day.**

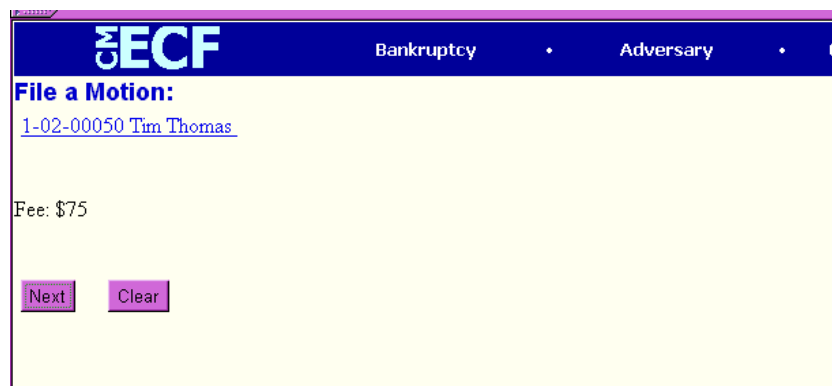
In this scenario we are docketing a motion for relief from stay. (If you are filing a new case, the steps are very similar, please see the end of this document for the steps.)

**STEP 1** Enter “y” in the text box as shown in **Figure 1** and click **Next**.

The screenshot shows the ECF (Electronic Case Filing) interface. At the top, there is a blue header with the ECF logo and navigation links for 'Bankruptcy', 'Adversary', and 'Case'. Below the header, the page title is 'File a Motion:'. Underneath, there is a link '1-02-00050 Tim Thomas'. The main content area has a yellow background. It contains the text 'Are you paying via the Internet [y or n]?' followed by a text input box containing the letter 'y'. Below this, there are two buttons: 'Next' and 'Clear'.

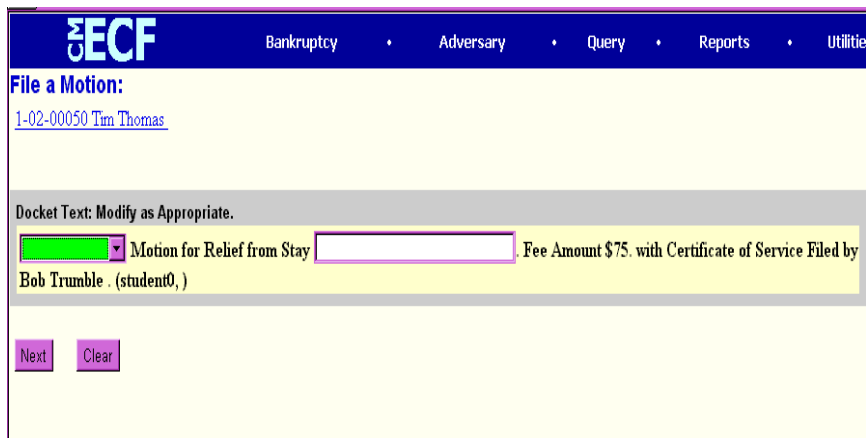
**Figure 1**

**STEP 2** The Fee screen appears, click **Next**. (See **Figure 2**)

The screenshot shows the ECF (Electronic Case Filing) interface. At the top, there is a blue header with the ECF logo and navigation links for 'Bankruptcy', 'Adversary', and 'Case'. Below the header, the page title is 'File a Motion:'. Underneath, there is a link '1-02-00050 Tim Thomas'. The main content area has a yellow background. It contains the text 'Fee: \$75'. Below this, there are two buttons: 'Next' and 'Clear'.

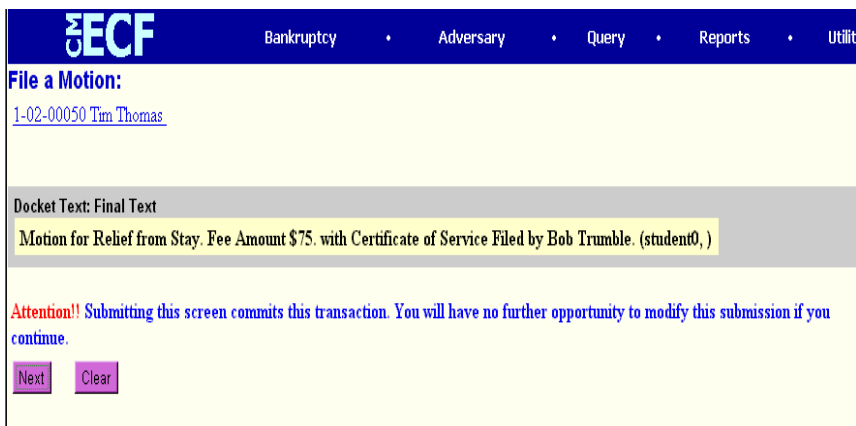
**Figure 2**

**STEP 3** The **Modify Docket Text** screen appears. Click **Next** to continue. (See **Figure 3**)

The screenshot shows the ECF (Electronic Case Filing) interface. At the top is a blue navigation bar with the ECF logo and links for Bankruptcy, Adversary, Query, Reports, and Utilities. Below the navigation bar, the page title is "File a Motion:" followed by a link "1-02-00050 Tim Thomas". The main content area has a grey header "Docket Text: Modify as Appropriate." Below this is a yellow box containing a dropdown menu with a green arrow pointing down, followed by the text "Motion for Relief from Stay", a text input field, and the text ". Fee Amount \$75. with Certificate of Service Filed by Bob Trumble . (student0, )". At the bottom of the yellow box are two buttons: "Next" and "Clear".

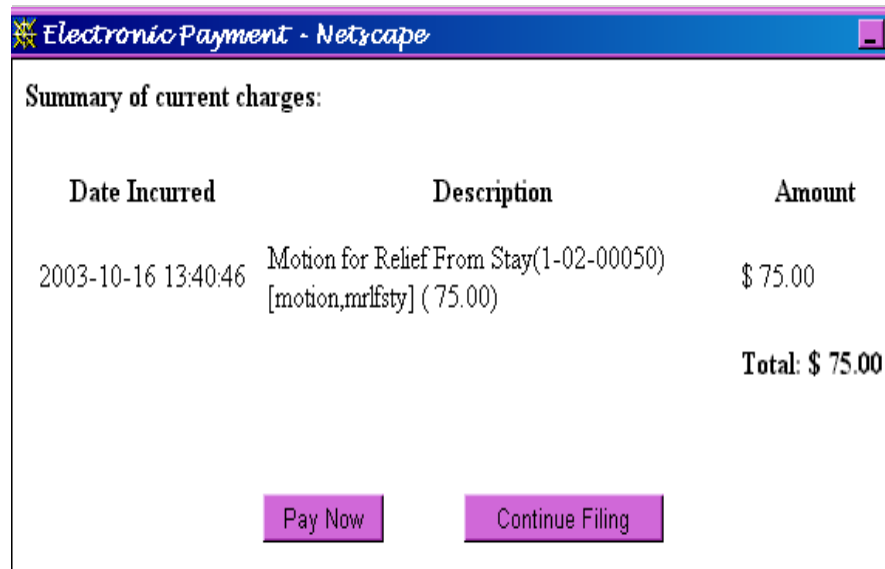
**Figure 3**

**STEP 4** The **Final Docket Text** screen appears. Once you are certain the docket text is correct, click **Next** to continue. (See **Figure 4**)

The screenshot shows the ECF (Electronic Case Filing) interface. At the top is a blue navigation bar with the ECF logo and links for Bankruptcy, Adversary, Query, Reports, and Utilities. Below the navigation bar, the page title is "File a Motion:" followed by a link "1-02-00050 Tim Thomas". The main content area has a grey header "Docket Text: Final Text". Below this is a yellow box containing the text "Motion for Relief from Stay. Fee Amount \$75. with Certificate of Service Filed by Bob Trumble. (student0, )". Below the yellow box is a red warning message: "Attention!! Submitting this screen commits this transaction. You will have no further opportunity to modify this submission if you continue." At the bottom of the yellow box are two buttons: "Next" and "Clear".

**Figure 4**

**STEP 5** You will then see the Notice of Electronic Filing screen display with the **Electronic Payment** window on top of it. The Electronic Payment Window displays your summary of current charges. You may click on **Pay Now** or **Continue Filing**. Remember, you must pay all fees by 8:00 pm each day. In this scenario, we will choose **Pay Now**. If you choose **Continue Filing**, the Electronic Payment window will close.  
(See Figure 5)



**Figure 5**

- STEP 6** The **Payment Collections** screen appears. Click on the down arrow next to **Card Type entry box** and select your card type. Next, type in your card number. (Do not use spaces) Then choose your expiration date month and year. After filling in the appropriate information, click **Submit Payment**. (See **Figure 6**)

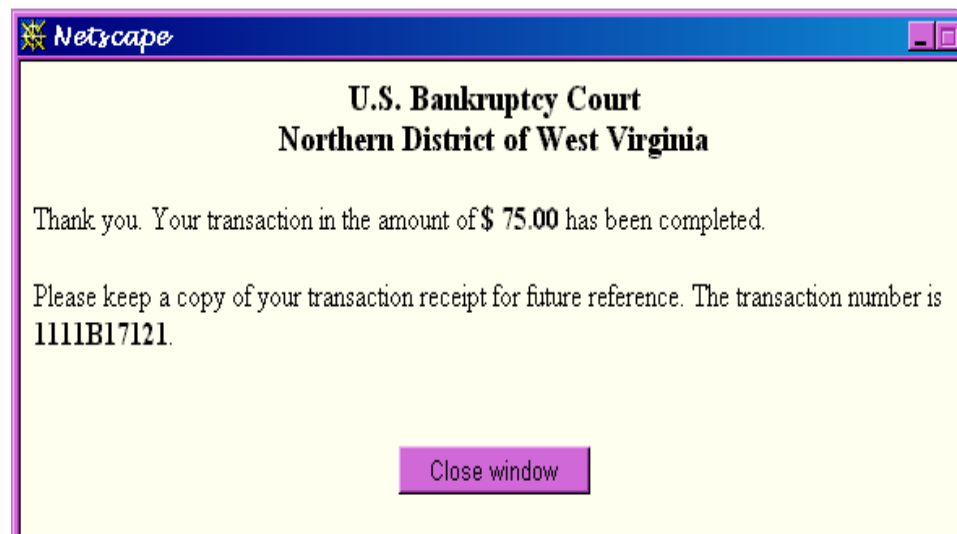
**Figure 6**

**STEP 7** You will then see the screen below. (See **Figure 7**)



**Figure 7**

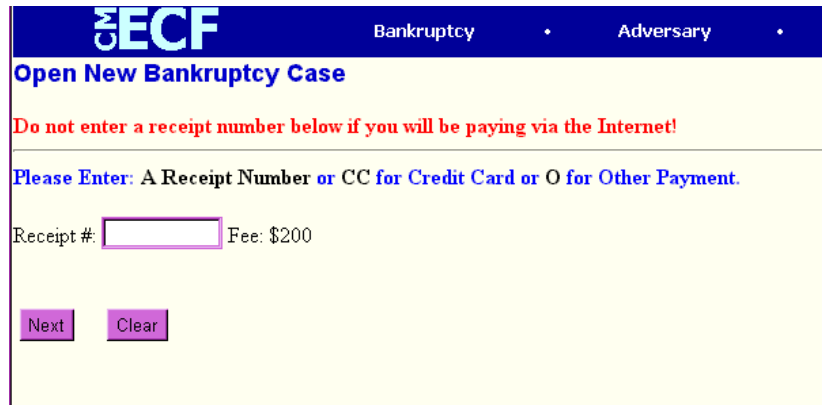
**STEP 8** The **Transaction Receipt** screen displays. The Transaction number is your receipt number. Click on **Close Window**. (See **Figure 8**)



**Figure 8**

Here is the only screen that is different when you file a voluntary petition.

Follow the instructions and do not enter any information in the receipt number field. Click **Next**. (See **Figure 9**)



ECF Bankruptcy • Adversary •

**Open New Bankruptcy Case**

**Do not enter a receipt number below if you will be paying via the Internet!**

**Please Enter: A Receipt Number or CC for Credit Card or O for Other Payment.**

Receipt #:  Fee: \$200

**Figure 9**

**You will then see the Electronic Payment Window on top of the Notice of Electronic Filing, just as in step 5. Follow steps 6 through 8 to finish the payment.**

The Internet Credit Card Module gives you 2 additional features under the Utilities Menu:  
 Internet Payment History and Internet Payments Due  
 (See Figure 10)



Figure 10

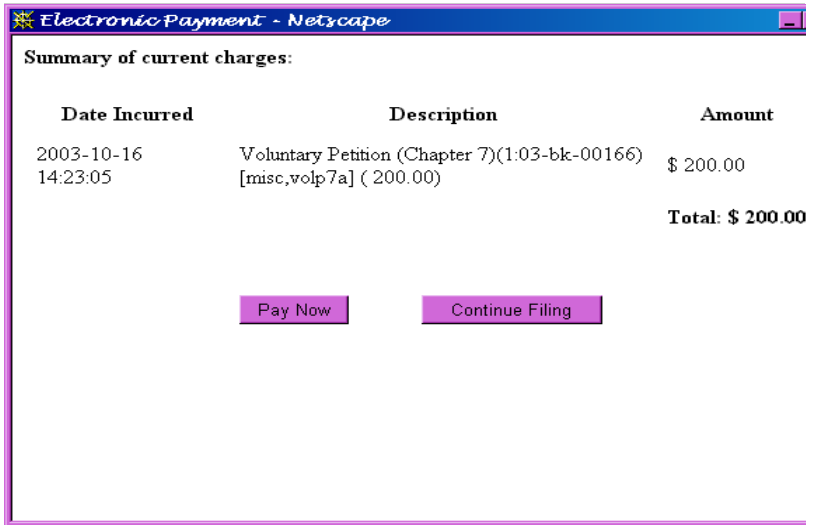
By clicking on the Internet Payment History Report and entering a date range, you are able to see what transactions have been charged to your credit card along with the associated transaction receipt numbers. (See Figures 11 and 12)

Figure 11

<div>ECF</div> <div>Bankruptcy • Adversary • Query • Reports • Utilities</div>				
U.S. Bankruptcy Court Northern District of West Virginia Internet Payment History for student0 , 9/1/2003 to 9/30/2003				
Date Paid	Description	Payment Method	Receipt #	Amount
2003-09-22 09:43:37	Motion for Relief From Stay(1:03-bk-00157) [motion,mrlfsty] ( 75.00)	credit card	1111B16799	\$ 75.00
2003-09-22 09:51:01	Voluntary Petition (Chapter 7)(5:03-bk-00164) [misc,volp7a] ( 200.00)	credit card	1111B16801	\$ 200.00

Figure 12

If you click on the option of **Internet Payments Due** under the Utilities menu, you may “settle” your account at any time. The **Electronic Payment** window opens if you have any outstanding credit card fees. (See **Figure 13**) You may then click on **Pay Now** and follow the screens to settle your account.



**Figure 13**

## Notice of Deposition

The [Notices](#) hypertext link lists various notices which an attorney submits to the court. The following instructions will guide you through the steps to file a Notice to Take Deposition.

- STEP 1** Click the [Bankruptcy](#) hypertext link from the CM/ECF Main Menu Bar. (See Figure 1.)



Figure 1

- STEP 2** The **Bankruptcy Events** screen displays. (See Figure 2.)

- ◆ Click the [Notices](#) hypertext link.

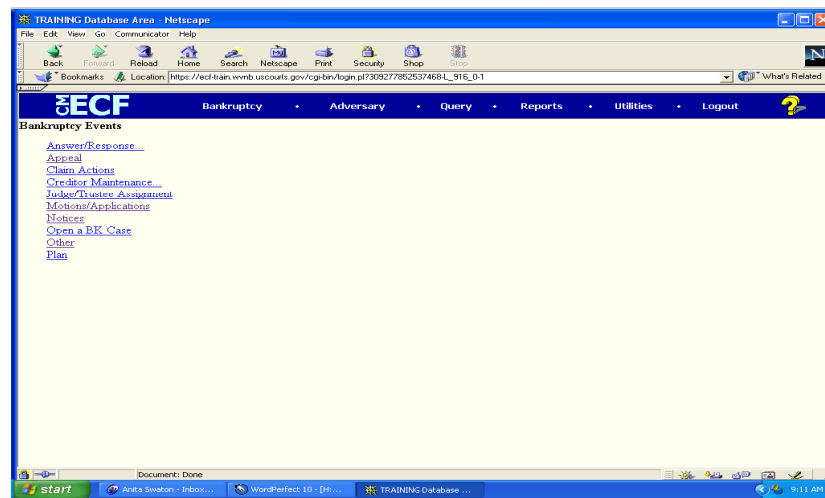


Figure 2

**STEP 3** The **Case Number** screen displays. (See Figure 3.)

- ◆ Enter the case number in yy-nnnnn format including the dash.
- ◆ Click **[Next]** to continue.

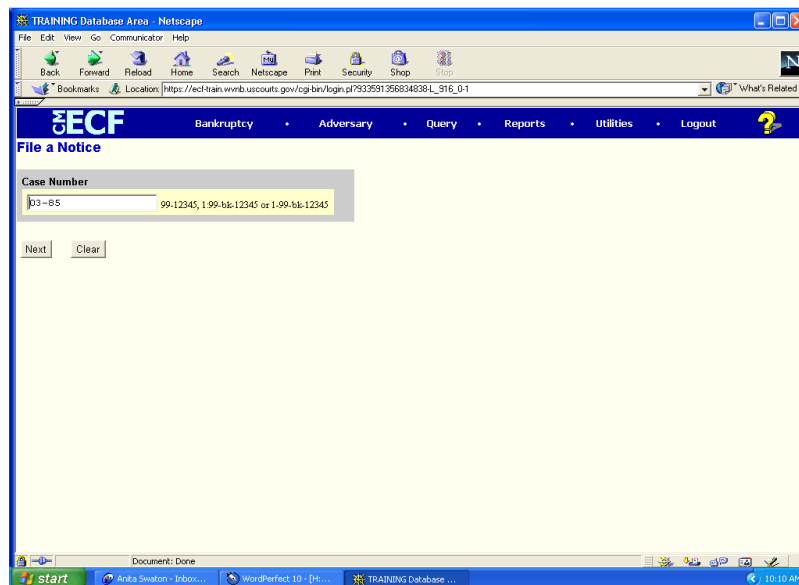


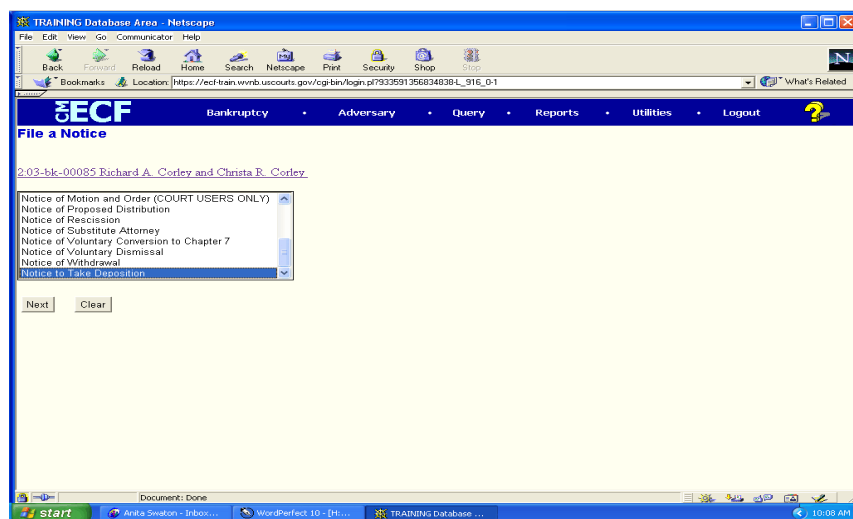
Figure 3

**STEP 4** The **Event Type** screen displays.

- ◆ Verify the case number and case name.
- ◆ If the case number and name do not match your document, click the browser **[Back]** button to re-enter the case number.

**Note:** If the system prompts that you have entered an invalid case number, click the browser **[Back]** button to try again. You may use the browser **[Back]** button at any time during this process to verify former screens until the final submission.

- ◆ Use the down arrow ▼ to the right of the box to scroll through the event list to select the document to be filed. Click to highlight ***Notice to Take Deposition.*** (See Figure 4.)
- ◆ Click **[Next]** to continue.

**Figure 4****STEP 5** The **Joint Filing With Other Attorneys** screen displays. (See Figure 5.)

- ◆ Click in the **Joint filing with other attorney(s)** box only if this is a joint filing to add any additional attorneys.
- ◆ Click **[Next]** to continue.

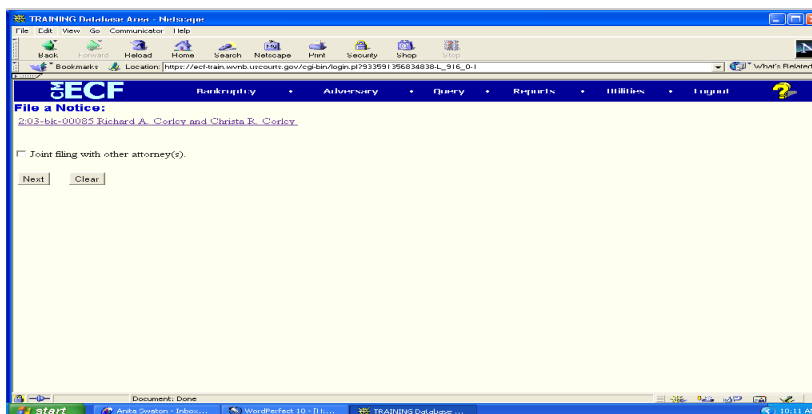


Figure 5

**STEP 6** The **Select a Party** screen displays. (See Figure 6.)

- ◆ Click to highlight the name of party whom you are representing **OR** refer to Section 9 in this Training Manual, **Multi-Part Motions**, Steps 6-10, to add a new party.

**Note:** Press the [Ctrl] key to choose more than one party.

- ◆ Click [Next] to continue.

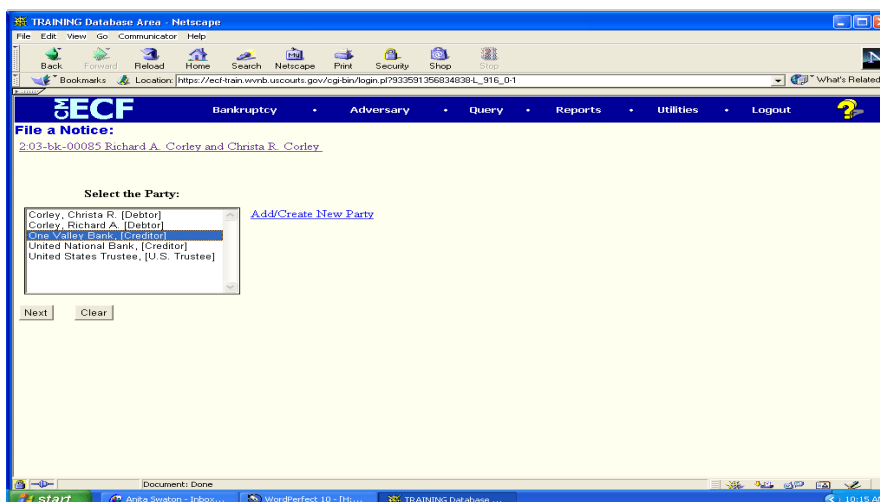


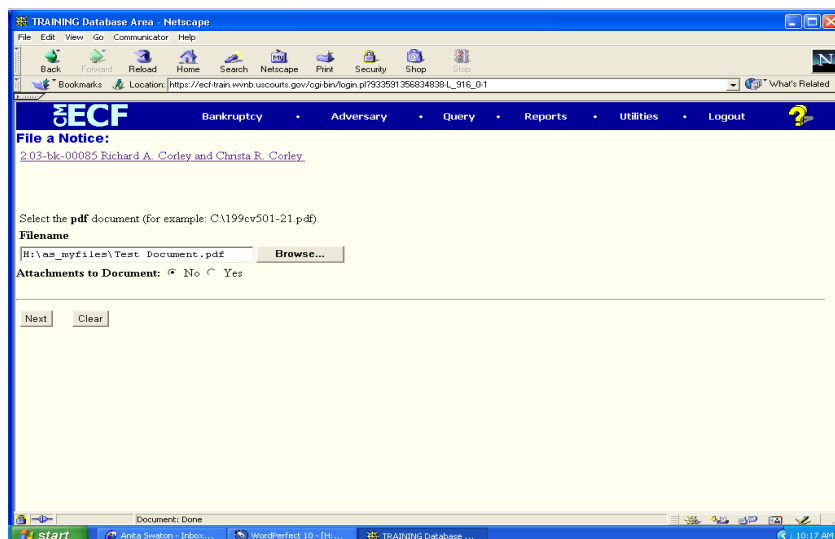
Figure 6

**STEP 7** The **PDF Document Selection** screen displays. (See Figure 7.)

- ◆ Click **[Browse]**, then navigate to the directory where the appropriate PDF file is located. Double-click the PDF file to select it.

**Note:** If you wish to view the image before associating it with this docket entry, before double-clicking, first right click on the highlighted filename and click on **open**. You can view the image in Adobe Acrobat, then close Adobe Acrobat when you have finished viewing the image.

- ◆ The **Attachments to Document** option defaults to **No**. If you have attachments to this document, click the **Yes** radio button to indicate there are attachments. (Refer to module: *Attachments to Documents* for more information).
- ◆ Click **[Next]** to continue.

**Figure 7****STEP 8** The **Deposition of Whom?** screen appears. (See Figure 8.)

- ◆ Insert the name of the person you are deposing.

- ◆ Click **[Next]** to continue.

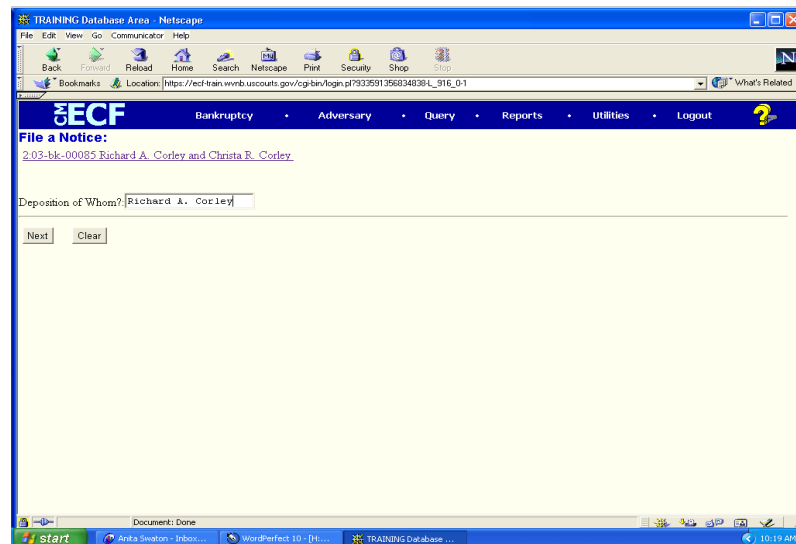


Figure 8

- STEP 9** The **Modify Docket Text** screen appears. (See Figure 9.)
- ◆ If appropriate, choose a prefix from the **Prefix Text** pick list.
  - ◆ Additional text may be added in the white text box.
  - ◆ Click **[Next]** to continue.

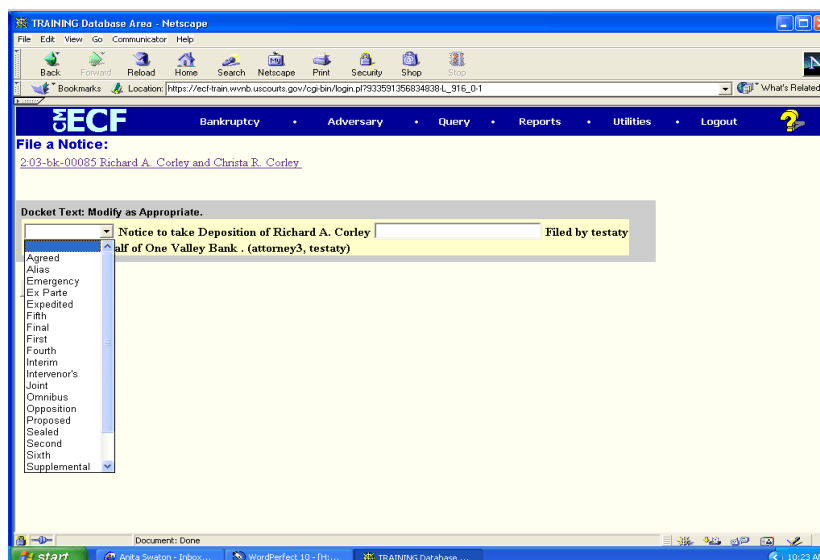


Figure 9

**STEP 10** The **Final Approval** screen displays. (See Figure 10.)

- ◆ Verify the Final Docket Text. Read the warning message.

If the Final Docket Text is correct:

- ◆ Click **[Next]** to continue and officially submit document.
- ◆ If the Final Docket Text is incorrect:
  - ◆ Click the browser **[Back]** button to find the error(s) and proceed with the event.
  - ◆ To abort or restart the transaction, return to **Step 1** and begin again.

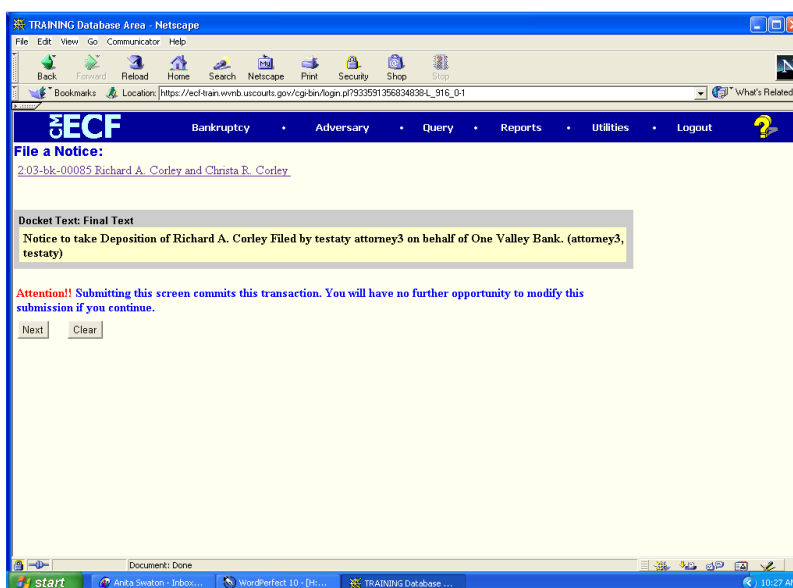


Figure 10

**STEP 11** The **Notice of Electronic Filing** screen displays. (See Figure 11.)

- ◆ The Notice of Electronic Filing is the verification that the filing has been filed electronically in the court's database. It certifies that the document is now an official court document.
- ◆ Clicking on the case number hypertext link on the **Notice of Electronic Filing** will present the *Docket Report* for this case.
- ◆ Clicking on the document number hypertext link will present the *PDF Image* of the document just filed.
- ◆ To print a copy of this notice click the browser **[Print]** icon.
- ◆ To save a copy of this notice, click **[File]** on the browser menu bar and select **Save Frame As**.
- ◆ You may also save the notice through the browser **File/Save** option.

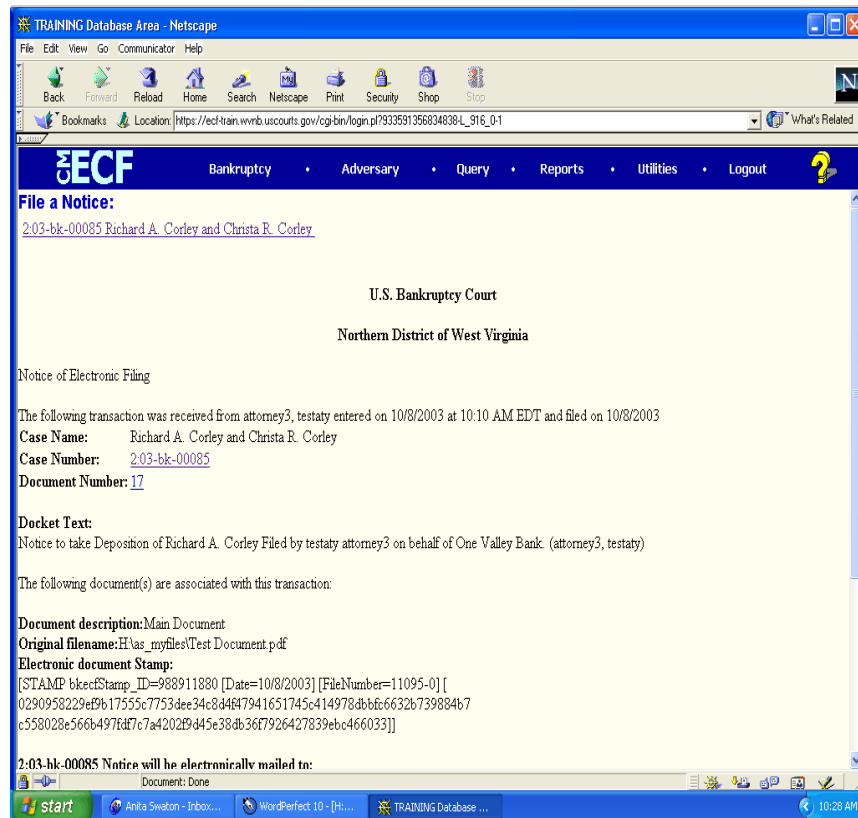


Figure 11

# Notice of Appeal

The following instructions will guide you through the process of filing a Notice of Appeal.

- STEP 1** Click the [Bankruptcy](#) hypertext link from the CM/ECF Main Menu Bar. **(See Figure 1.)**



**Figure 1**

- STEP 2** The **Bankruptcy Events** screen displays. **(See Figure 2.)**
- ◆ Click the [Appeal](#) hypertext link.

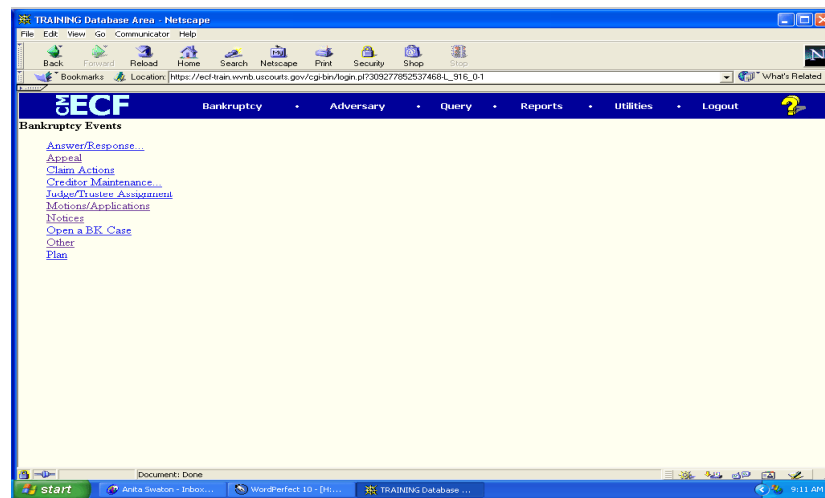


Figure 2

**STEP 3** The **Case Number** screen displays. (See Figure 3.)

- ◆ Enter the case number in yy-nnnnn format including the dash.
- ◆ Click **[Next]** to continue.

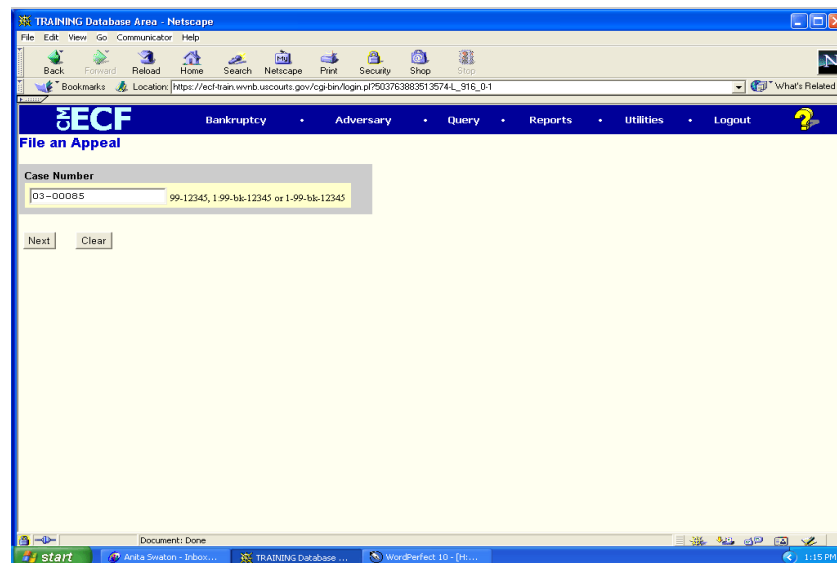


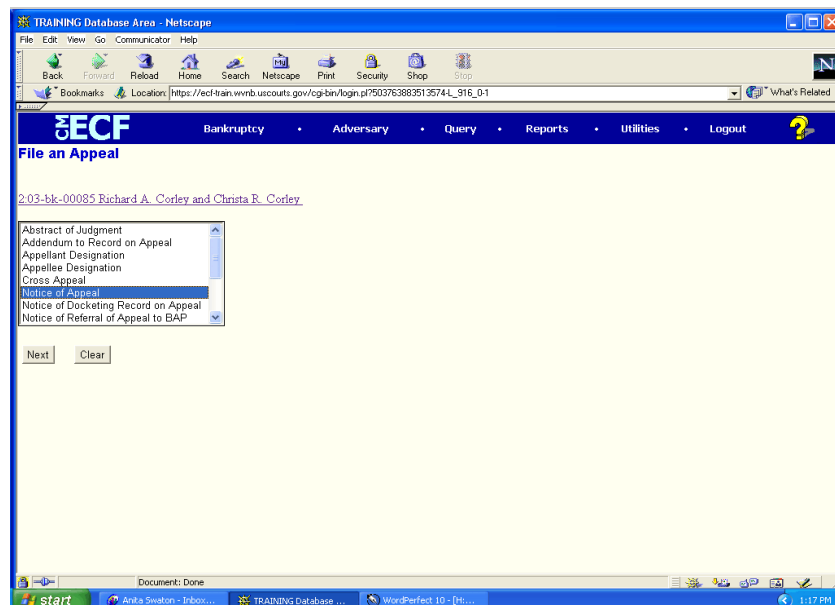
Figure 3

**STEP 4** The **Event Type** screen displays.

- ◆ Verify the case number and case name.
- ◆ If the case number and name do not match your document, click the browser **[Back]** button to re-enter the case number.

**Note:** If the system prompts that you have entered an invalid case number, click the browser **[Back]** button to try again. You may use the browser **[Back]** button at any time during this process to verify former screens until the final submission.

- ◆ Use the down arrow ▼ to the right of the box to scroll through the event list to select the document to be filed. Click to highlight **Notice of Appeal**. (See Figure 4.)
- ◆ Click **[Next]** to continue.

**Figure 4****STEP 5** The **Joint Filing With Other Attorneys** screen displays. (See Figure 5.)

- ◆ Click in the **Joint filing with other attorney(s)** box only if this is a joint filing to add any additional attorneys.

- ◆ Click **[Next]** to continue.

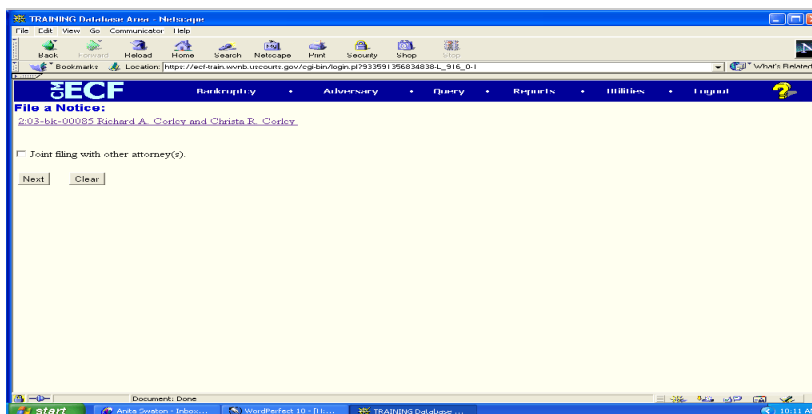


Figure 5

**STEP 6** The **Select a Party** screen displays. (See Figure 6.)

- ◆ Click to highlight the name of party whom you are representing **OR** refer to Section 9 in this Training Manual, **Multi-Part Motions**, Steps 6-10, to add a new party.

**Note:** Press the **[Ctrl]** key to choose more than one party.

- ◆ Click **[Next]** to continue.

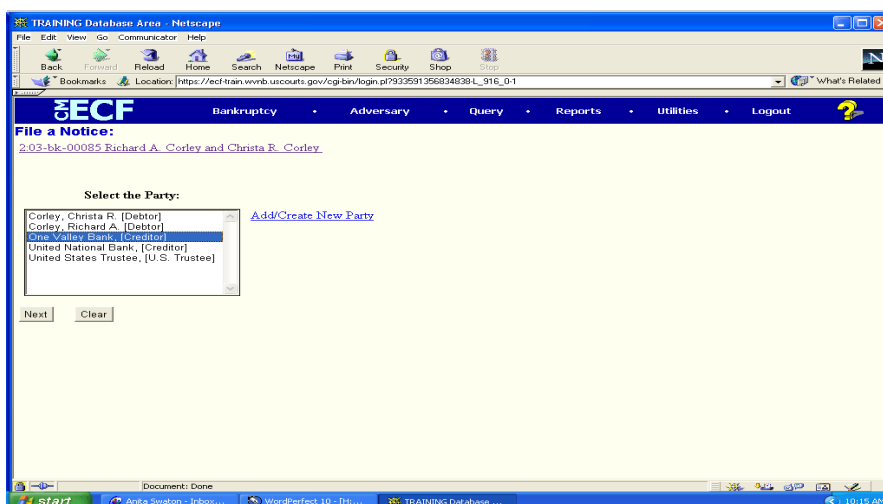


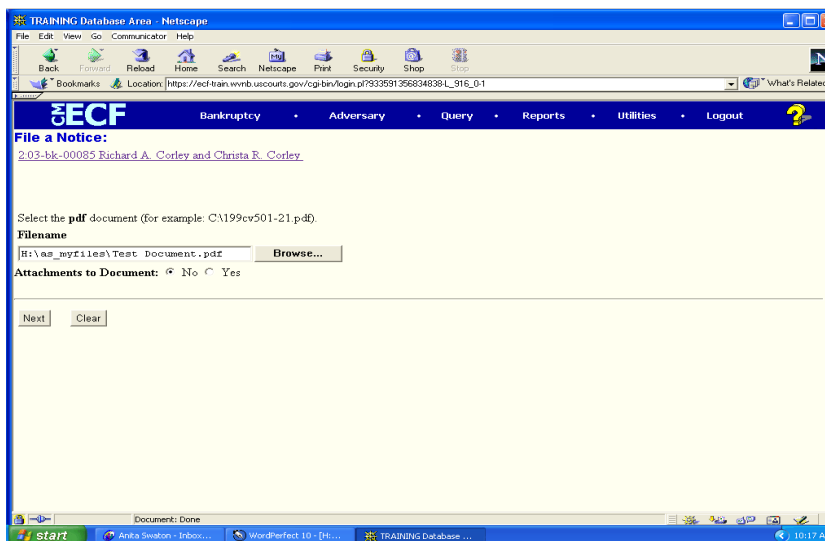
Figure 6

**STEP 7** The **PDF Document Selection** screen displays. (See Figure 7.)

- ◆ Click [**Browse**], then navigate to the directory where the appropriate PDF file is located. Double-click the PDF file to select it.

**Note:** If you wish to view the image before associating it with this docket entry, before double-clicking, first right click on the highlighted filename and click on **open**. You can view the image in Adobe Acrobat, then close Adobe Acrobat when you have finished viewing the image.

- ◆ The **Attachments to Document** option defaults to **No**. If you have attachments to this document, click the **Yes** radio button to indicate there are attachments. (Refer to module: *Attachments to Documents* for more information).
- ◆ Click [**Next**] to continue.



**Figure 7**

**STEP 8** The **Refer to Existing Event(s)?** screen displays. (See Figure 8.)

- ◆ Click in **Refer to existing event(s)?**
- ◆ Click [**Next**] to continue.

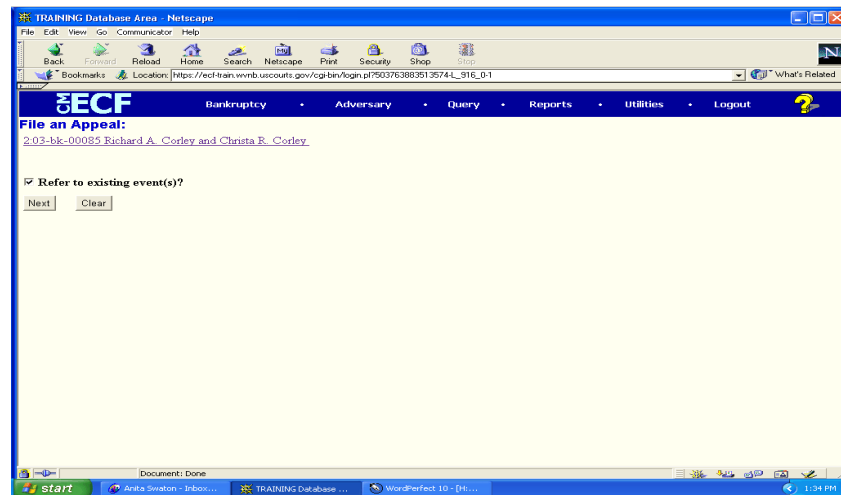


Figure 8

**STEP 9** The **Select the Category to Which Your Event Relates** screen displays. (See Figure 9.)

- ◆ Click on order.
- ◆ Click **[Next]** to continue.

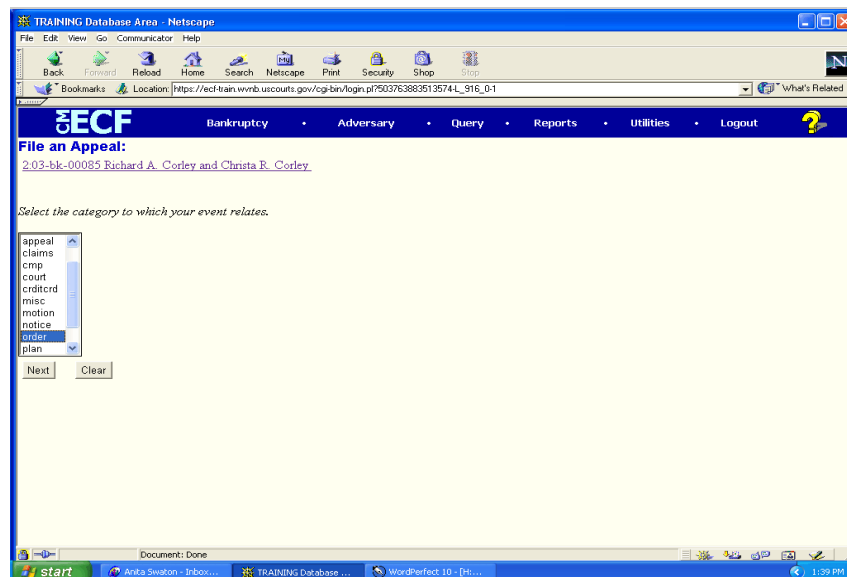


Figure 9

**STEP 10** All Orders docketed in the case will display. (See Figure 10.)

- ◆ Select the appropriate order from which you are appealing.
- ◆ Click **[Next]** to continue.

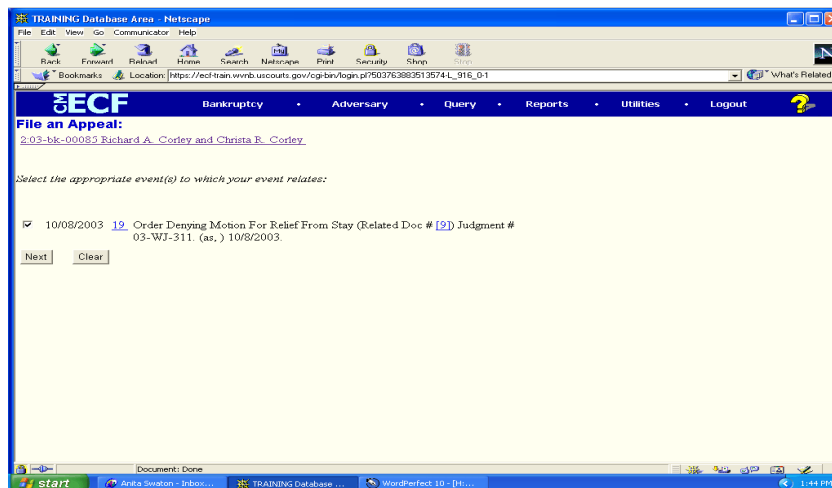


Figure 10

**STEP 11** The internet payment screen displays. (See Figure 11.)

- ◆ Enter **n** after ***Are you paying via the internet?***
- ◆ Click **[Next]** to continue.

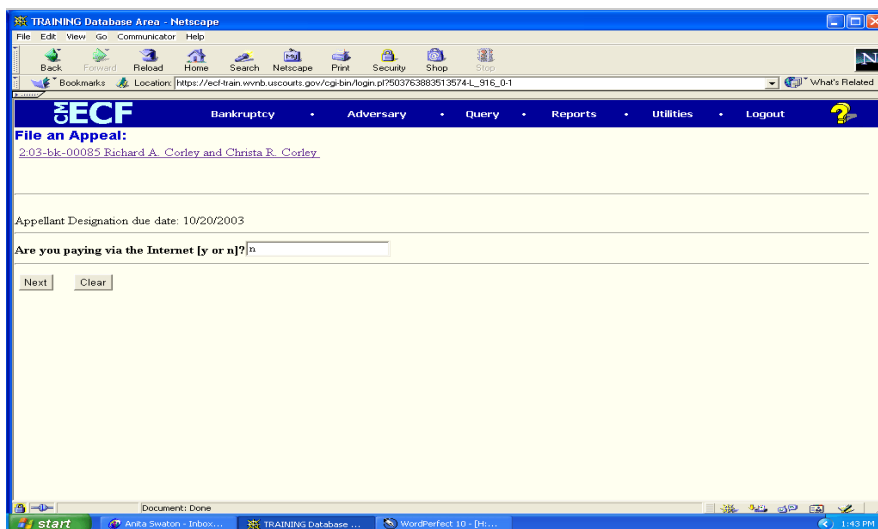


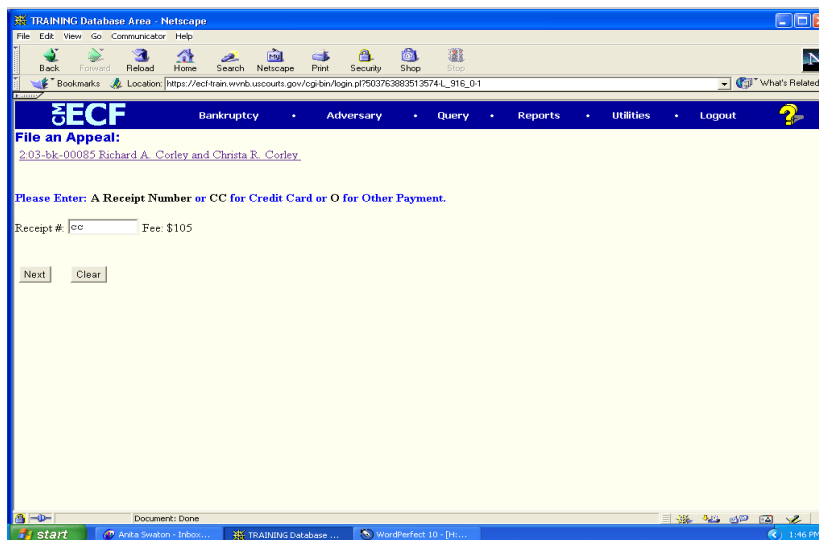
Figure 11

**STEP 12** The **Filing Fee** screen will display. (See Figure 12.)

- ◆ Enter **cc** in the Receipt # field.

NOTE: The fee amount will be revised November 1, 2003 to reflect the increase in fees to \$255.00.

- ◆ Click **[Next]** to continue.



**Figure 12**

**STEP 13** The **Modify Docket Text** screen appears. (See Figure 13.)

- ◆ If appropriate, choose a prefix from the **Prefix Text** pick list.
- ◆ Additional text may be added in the white text box.
- ◆ Click **[Next]** to continue.

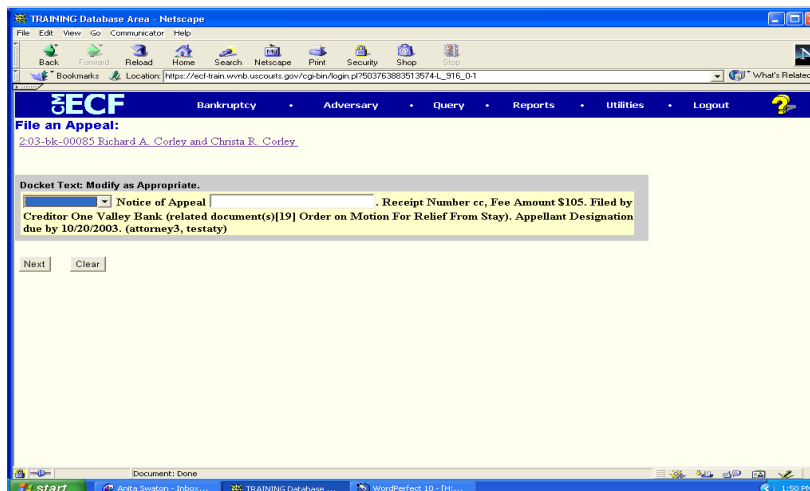


Figure 13

- STEP 14** The **Final Approval** screen displays. (See Figure 14.)
- ◆ Verify the Final Docket Text. Read the warning message.
  - ◆ If the Final Docket Text is correct:
  - ◆ Click **[Next]** to continue and officially submit document.
  - ◆ If the Final Docket Text is incorrect:
    - ◆ Click the browser **[Back]** button to find the error(s) and proceed with the event.
    - ◆ To abort or restart the transaction, return to **Step 1** and begin again.

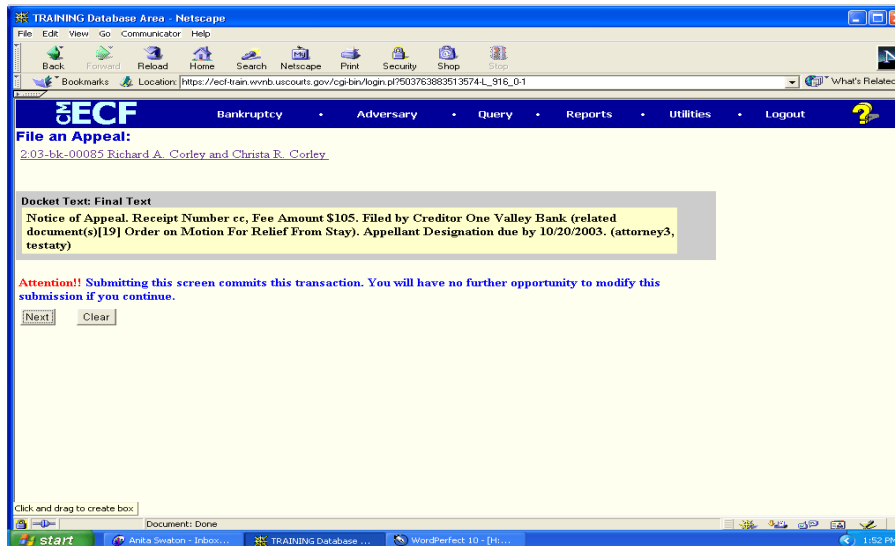


Figure 14

**STEP 15** The **Notice of Electronic Filing** screen displays. (See Figure 15.)

- ◆ The Notice of Electronic Filing is the verification that the filing has been filed electronically in the court's database. It certifies that the document is now an official court document.
- ◆ Clicking on the case number hypertext link on the **Notice of Electronic Filing** will present the *Docket Report* for this case.
- ◆ Clicking on the document number hypertext link will present the *PDF Image* of the document just filed.
- ◆ To print a copy of this notice click the browser **[Print]** icon.
- ◆ To save a copy of this notice, click **[File]** on the browser menu bar and select **Save Frame As**.
- ◆ You may also save the notice through the browser **File/Save** option.

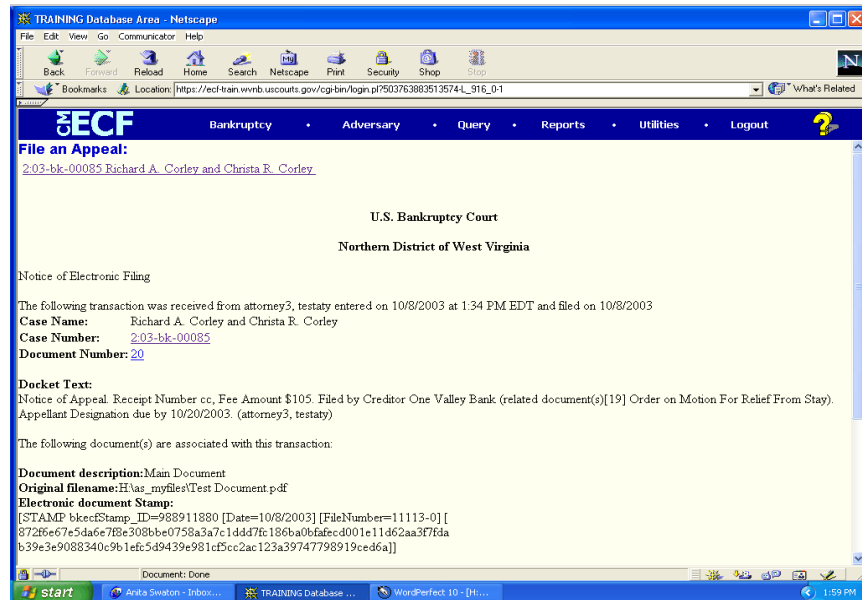


Figure 15

## Objections to Motions

Attorneys file a variety of responses, objections and answers. The following instructions will guide you through the Electronic Case Filing system for docketing events such as responses, objections and answers. Although the example demonstrates a Response to a Motion for Relief from Stay, the same steps would be followed for any other type of response, reply or answer.

**STEP 1** Click the Bankruptcy hyperlink on the CM/ECF Main Menu. (See Figure 1.)



Figure 1

**STEP 2** The **BANKRUPTCY EVENTS** screen displays. (See Figure 2.)

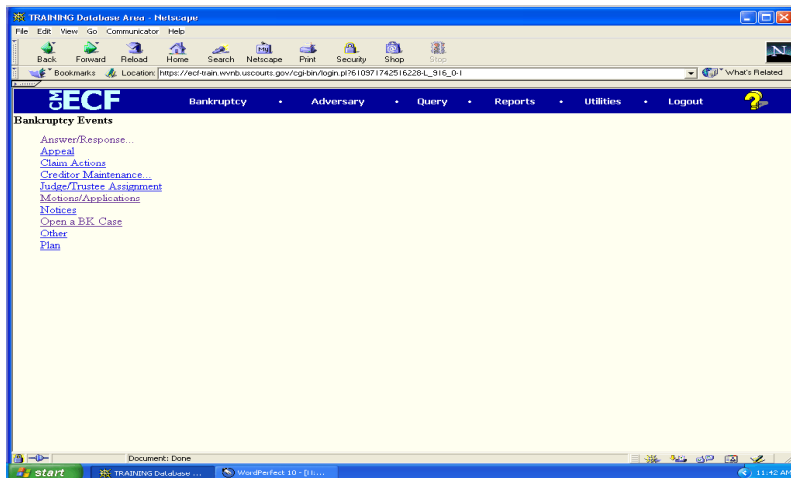
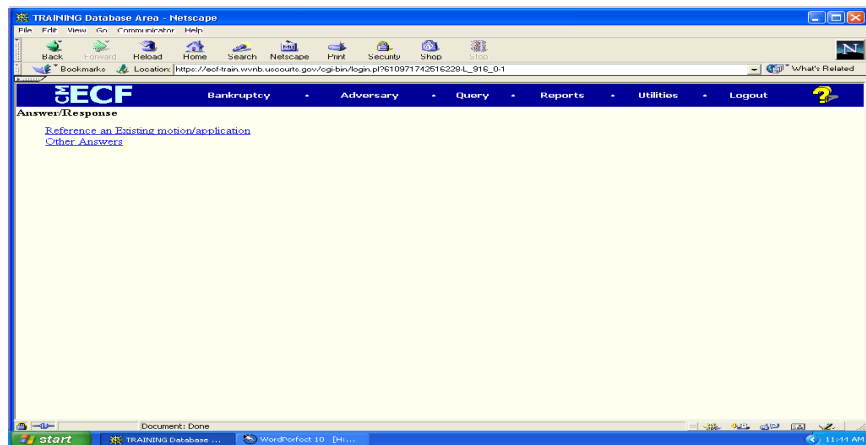


Figure 2

◆ Click the Answer/Response hyperlink.

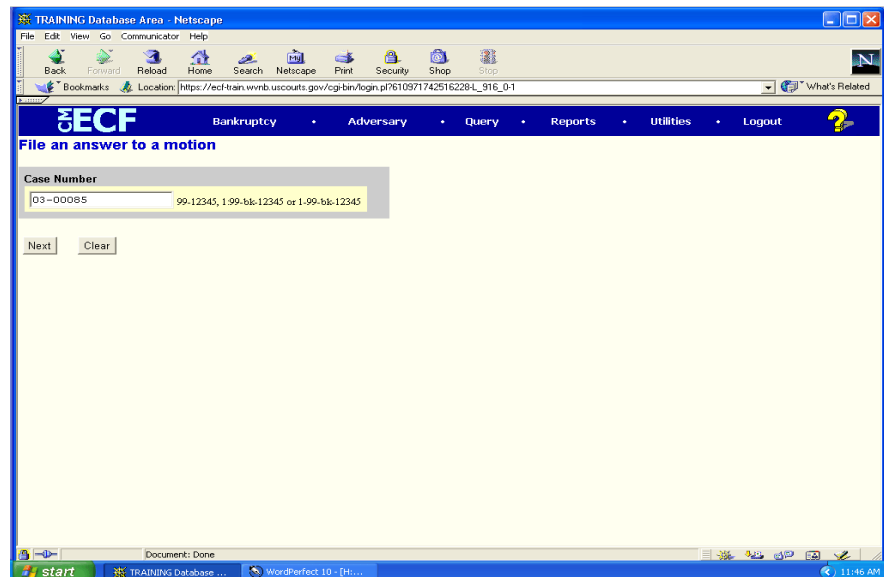
**STEP 3** The **ANSWER/RESPONSE TYPE** screen displays.  
(See Figure 3.)



**Figure 3**

- ◆ Click the Reference an Existing motion/application hyperlink.

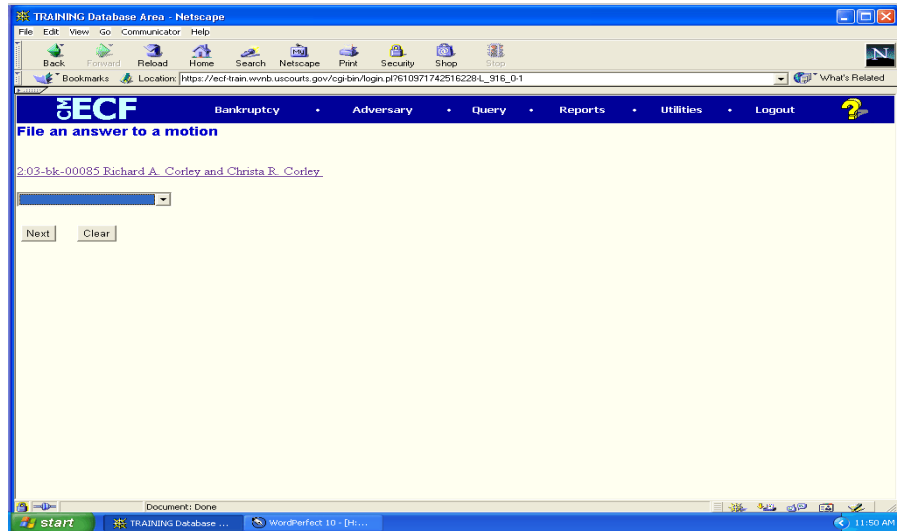
**STEP 4** The **CASE NUMBER** screen displays (See Figure 4.)



**Figure 4**

- ◆ Enter the case number in yy-nnnnn format.
- ◆ Click **[Next]** to continue.

**STEP 5**      The **DOCUMENT TYPE SELECTION** screen displays.  
(See Figure 5a.)



**Figure 5a**

- ◆ Verify the case number and case name.
- ◆ If the case number and name do not match your document, click the browser **[Back]** button to re-enter the case number.

**NOTE:** If the system prompts that you have entered an invalid case number, click the browser **[Back]** button to try again. You may use the **[Back]** button at any time during this docketing process to verify former screens until the final submission.

- ◆ Click the down arrow in the **Document Type** pick list to reveal list document options. (See Figure 5b.)

- ◆ Your choices in the starter database are Answer to Interrogatories, Objection, Reply or Response. Select **Objection**. (See Figure 5c.)

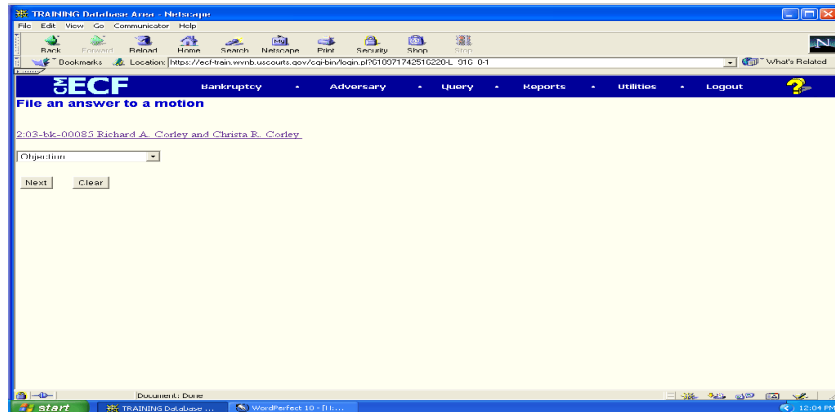


Figure 5c

- ◆ Click [Next].

**STEP 6** The **JOINT FILING** screen displays. (See Figure 6.)

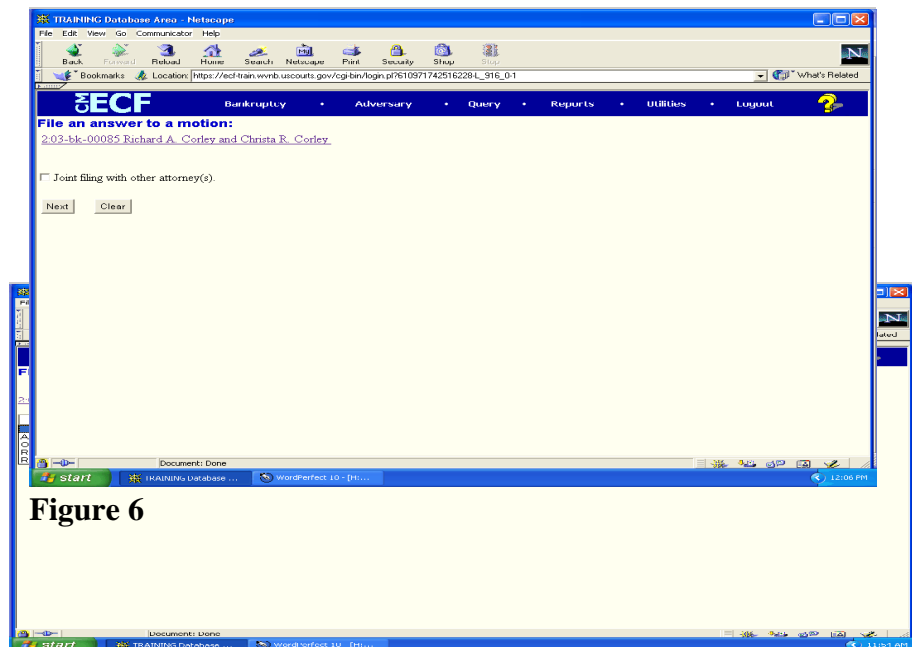
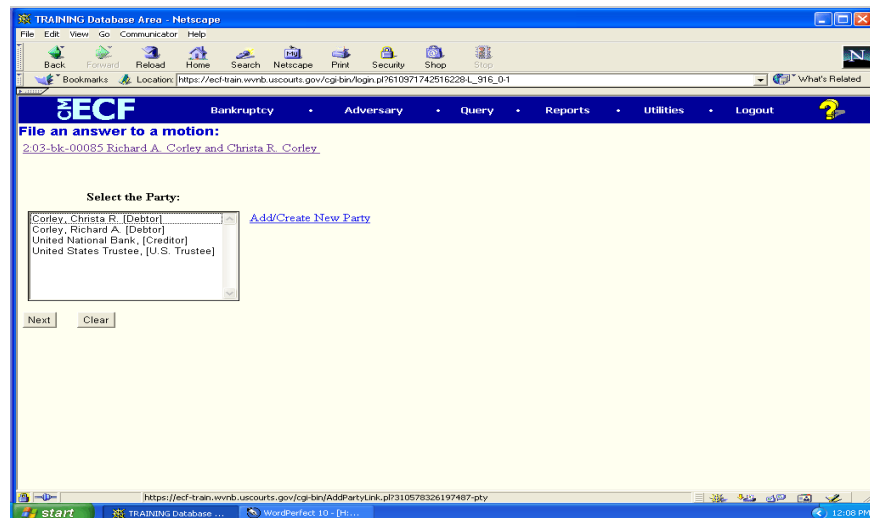


Figure 6

Figure 5b

- ◆ This screen will only be used if another attorney is joining in this filing. If you are the only attorney filing this application, skip this screen.
- ◆ If this were a joint filing and the box were checked, a listing of attorneys presently on the case would be presented for selection.
- ◆ Click **[Next]**.

**STEP 7** The **SELECT PARTY** screen displays. (See Figure 7a.) All participating parties on the case will appear on this list.



**Figure 7a**

- ◆ It will be assumed that the objection is being tendered by the attorney for the debtors. Therefore, click to highlight the name of the debtors filing the objection. (Holding down the **[Ctrl]** key will allow for the highlighting of more than one name. (See Figure 7b.)

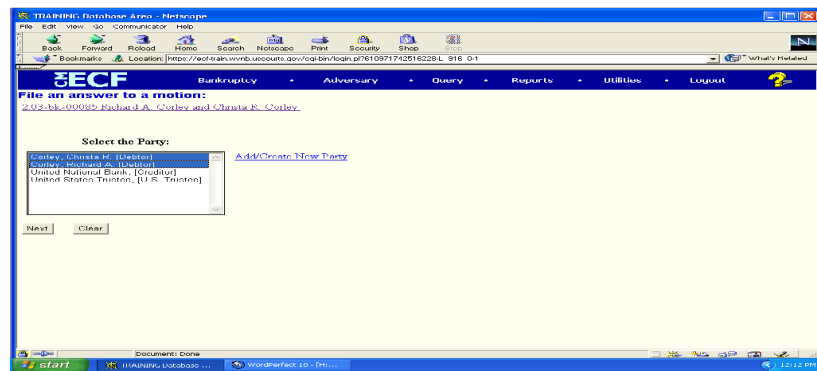


Figure 7b

**NOTE:** Refer to Step 13 if you are not representing the debtor(s) and the party you are representing does not appear on the **Select the Party:** screen.

- ◆ Click **[Next]**

**STEP 8** The **PDF DOCUMENT SELECTION** screen displays. (See Figure

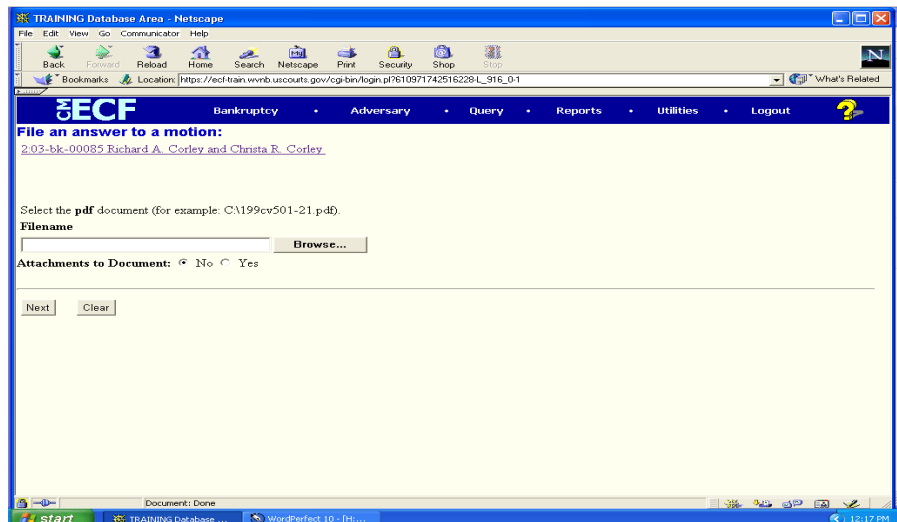


Figure 8a

8a.)

- ◆ Click **[Browse]**, then navigate to the directory where the PDF file is located. Double-click the PDF file to select it.
- ◆ In the **File Upload** screen, change **Files of type:** to **All Files(\*.\*)**.

can  
when

**NOTE:** If you wish to view the image before selecting to be sure you have chosen the correct file, before double-clicking, first right click on the highlighted filename and click on **open**. You view the image in Adobe Acrobat, then close Adobe Acrobat you have finished viewing the image.

(See Figure 8b.)

- ◆ The **Attachments to Document** option defaults to **No**. If you have attachments to this document, click the **Yes** radio button to indicate there are attachments. (Refer to module: *Attachments to Documents* for more information.)

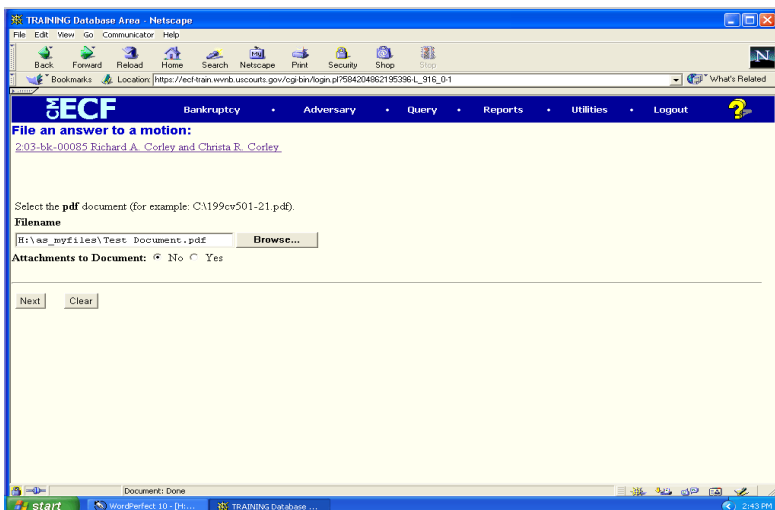


Figure 8b

- ◆ Click **[Next]** to continue.

**STEP 9** The **Refer to Existing Event(s)?** screen will display. (See Figure 9a.)

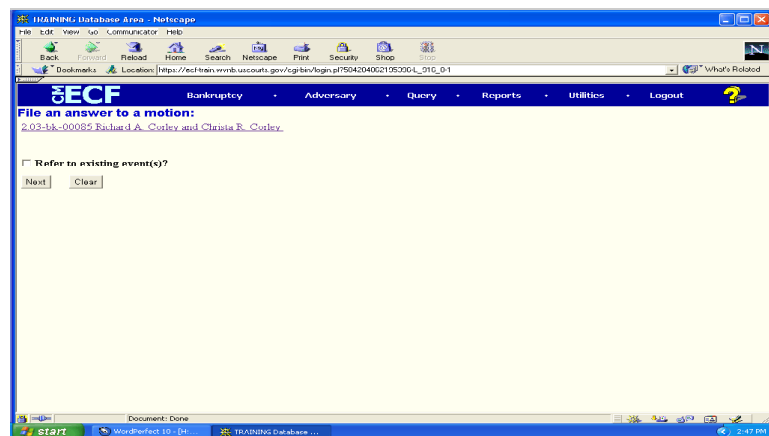


Figure 9a

- ◆ Select ***Refer to Existing Event(s)?***
- ◆ Click **[Next]** to continue.
- ◆ The ***File an answer to a motion:*** screen displays. (See Figure 9b.)

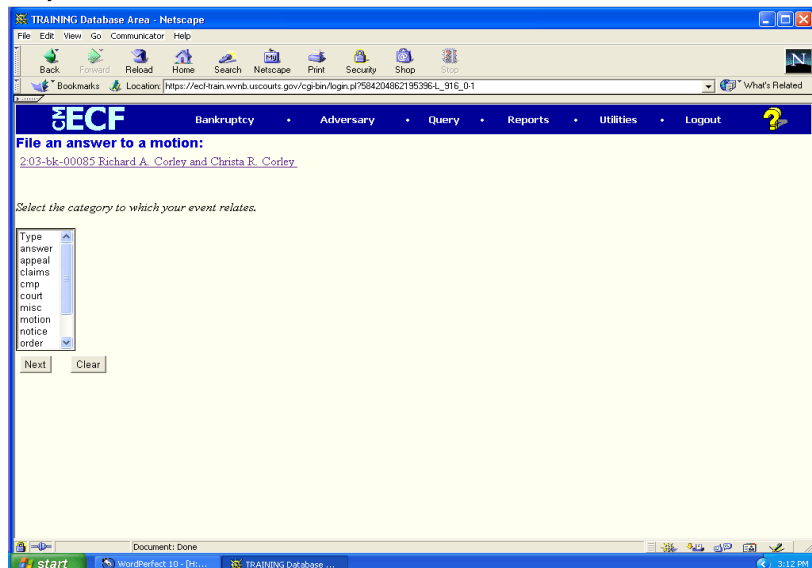


Figure 9b

- ◆ Click on motion (See Figure 9c.)

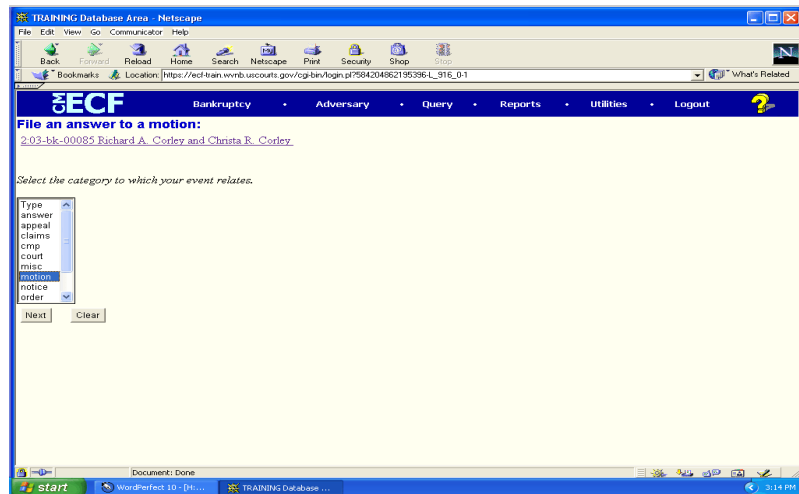


Figure 9c

- ◆ Click [Next] to continue.
- ◆ Select the appropriate motion you wish to object to by clicking in the box next to the date. If there is more than one possibility, click on the document number hyperlink to view the imaged application or motion. (See Figure 9d.)

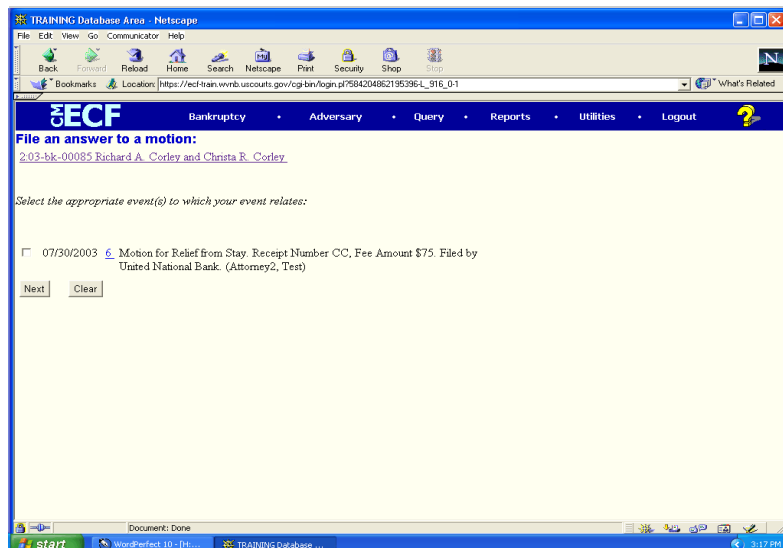
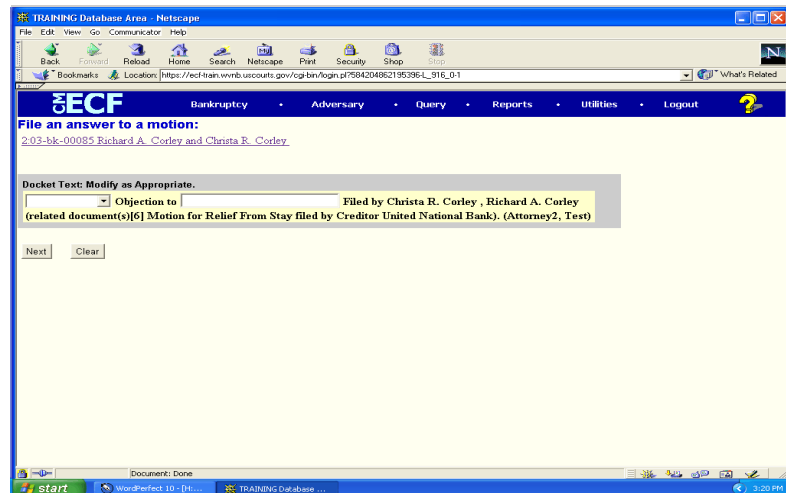


Figure 9d

- ◆ Click [Next].

**STEP 10** The **MODIFY DOCKET TEXT** screen appears. This screen will display a prefix box and a supplemental text box to add more detail to the docket text. (See Figure 10.)



**Figure 10**

- ◆ Click the down arrow to display the prefix options. Select a descriptive prefix, if it is appropriate.
- ◆ If necessary, add detail to the final text.
- ◆ Click **[Next]**.

**STEP 11** The **FINAL DOCKET TEXT** screen appears. (See Figure 11.)

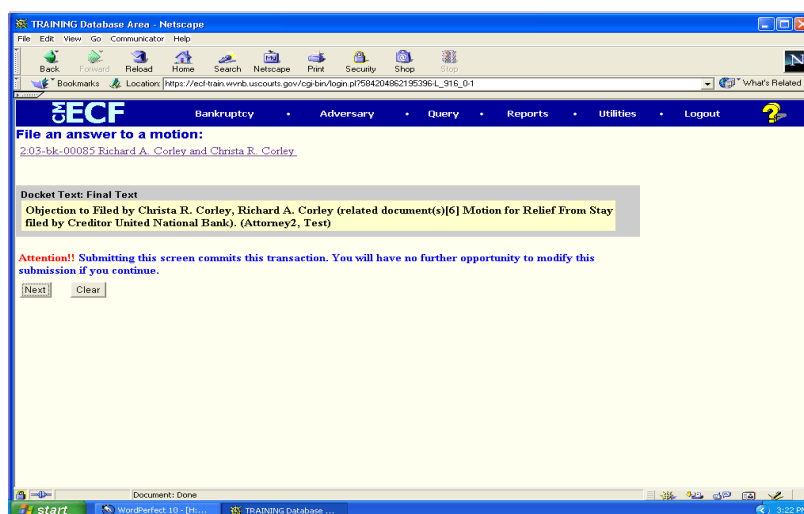


Figure 11

- ◆ Use caution on this screen and proof the contents of the entry carefully. Read the **Attention!!** notice.

**NOTE:** To abort or restart the transaction at any time, click the Bankruptcy hyperlink on the main menu bar.

- ◆ When you click **[Next]**, the entry is sent to the court's database.

**STEP 12** The **NOTICE OF ELECTRONIC FILING** screen appears. (See Figure 12.)

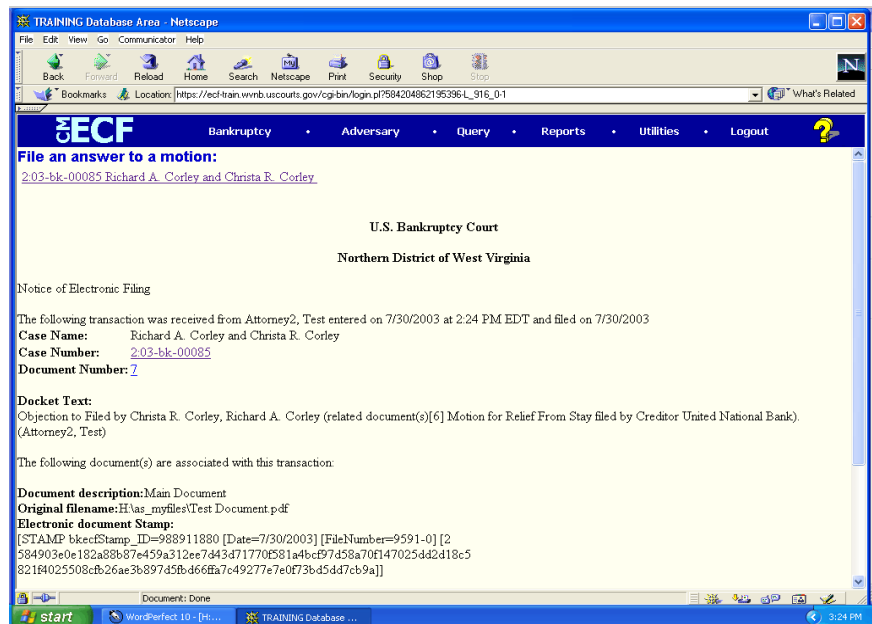


Figure 12

- ◆ The Notice of Electronic Filing is the verification that the filing has been filed electronically in the court's database. It certifies that the document is now an official court document.
- ◆ Clicking on the case number hypertext link on the **Notice of Electronic Filing** will present the *Docket Report* for this case.
- ◆ Clicking on the document number hypertext link will present the *PDF Image* of the document just filed.
- ◆ To print a copy of this notice click the browser **[Print]** icon.
- ◆ To save a copy of this notice, click **[File]** on the browser menu bar and select **Save Frame As**.
- ◆ You may also save the notice through the browser **File/Save** option.

**STEP 13** Select **Add/Create a New Party** if the party you represent does not appear on the **Select the Party:** screen. (See Figure 13a.)

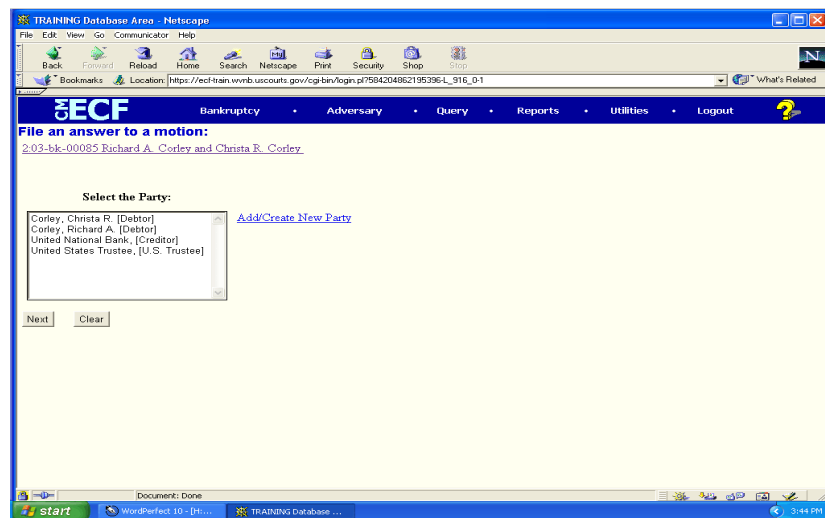


Figure 13a

- ◆ On **Search for a Party** screen, enter the name of the party you represent in the **Last/Business Name** field. (See Figure 13b.)

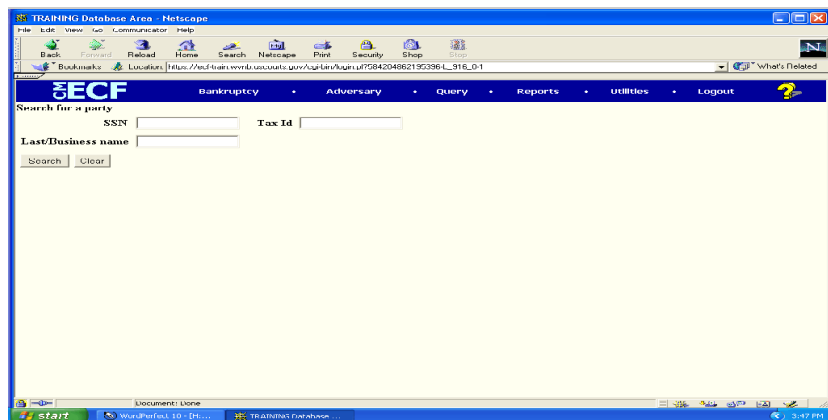


Figure 13b

- ◆ Then click **Search**.
- ◆ Select name from list **or** Create new party. (See Figure 13c.)

TRAINING Database Area - Netscape

File Edit View Go Communicator Help

Back Forward Reload Home Search Netscape Print Security Shop Stop

Bookmarks Location: https://ecf-train.wvrb.uscourts.gov/cgi-bin/login.pl?584204862195386L\_916\_01

What's Related

**ECF** Bankruptcy Adversary Query Reports Utilities Logout

Search for a party

SSN  Tax Id

Last/Business name

Search Clear

**Party search results**

North American Capital Corporation

Select name from list Create new party

Document: Done

start WordPerfect 10 - [H... TRAINING Database ... 3:51 PM

Figure 13c

- ◆ Enter party if applicable and address of party.
- ◆ Select role such as **creditor** or **interested party**. (See Figure 13d.)

TRAINING Database Area - Netscape

File Edit View Go Communicator Help

Back Forward Reload Home Search Netscape Print Security Shop Stop

Bookmarks Location: https://ecf-train.wvrb.uscourts.gov/cgi-bin/login.pl?584204862195386L\_916\_01

What's Related

**ECF** Bankruptcy Adversary Query Reports Utilities Logout

**Party Information**

North American Capital Corporation SSN: Unknown

Office  Address 1  2300 Capital Avenue

Address 2  Address 3

City  Wheeling State  WV Zip  26003

County  Ohio Country

Phone  Fax

E-mail

ProSe  no Role  Creditor (cr.c)

Party text

Submit Cancel Clear

Document: Done

start WordPerfect 10 - [H... TRAINING Database ... 4:02 PM

Figure 13d

- ◆ Select **Submit**

- ◆ Select party you represent on **Select the Party** screen. (See Figure 13e.)

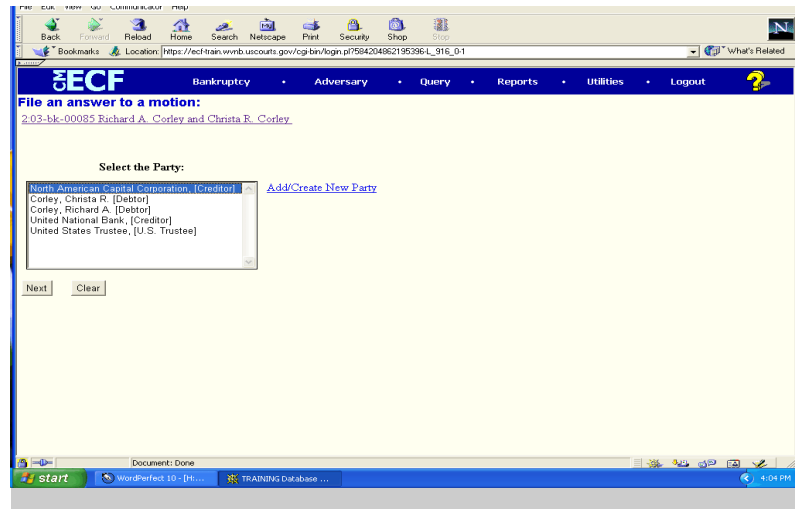


Figure 13e

- ◆ Click **Next**.
- ◆ Create attorney/party association. (See Figure 13f.)

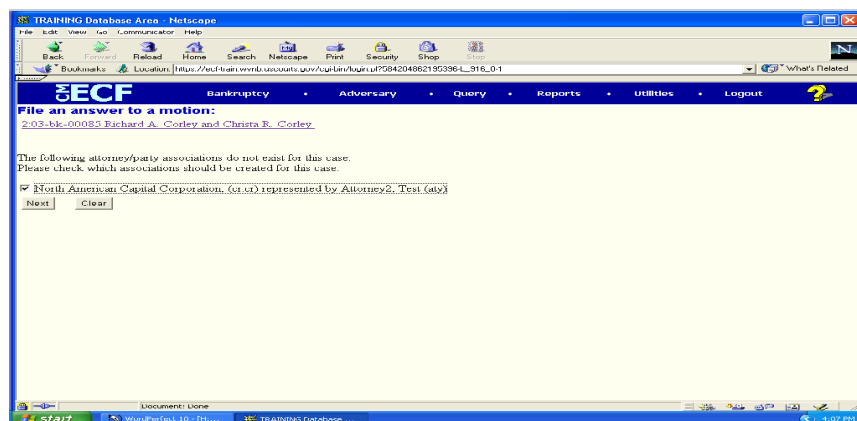


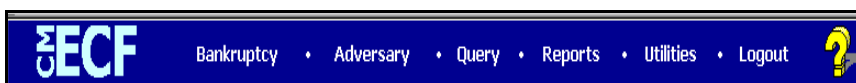
Figure 13f

- ◆ Click **[Next]**.
- ◆ Continue with steps 8-12.

## Affidavit

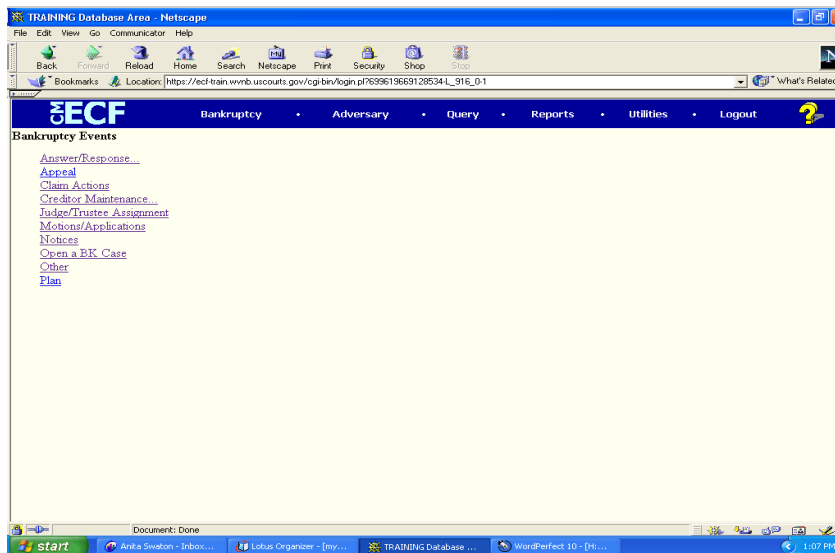
This process shows the steps and screens required for an attorney to electronically file an affidavit. This lesson will demonstrate the filing of an affidavit in support of a motion to avoid a lien.

- STEP 1** Click on the Bankruptcy hyperlink on the CM/ECF Main Menu Bar. (See Figure 1.)



**Figure 1**

- STEP 2** The **BANKRUPTCY EVENTS** screen displays. (See Figure 2.)



**Figure 2**

- ◆ Click on the Other hyperlink.

**STEP 3** The **CASE NUMBER** screen displays (See Figure 3). The system will display the number of the last case you accessed in this session.

- ◆ If this is **not** the case in which you are filing an answer, delete this case number and enter the correct case number using yynn timer format.
- ◆ Click **[Next]** to continue.

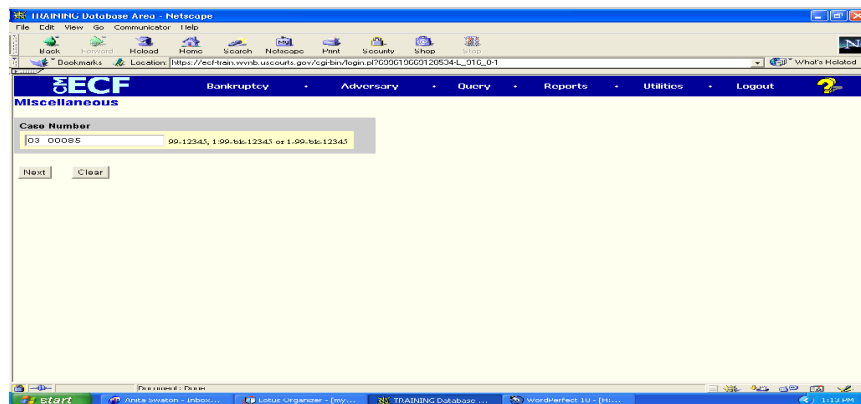


Figure 3

**STEP 4** The **Miscellaneous** screen appears. (See Figure 4.)

- ◆ Click on **Affidavit**.
- ◆ Click **[Next]** to continue.

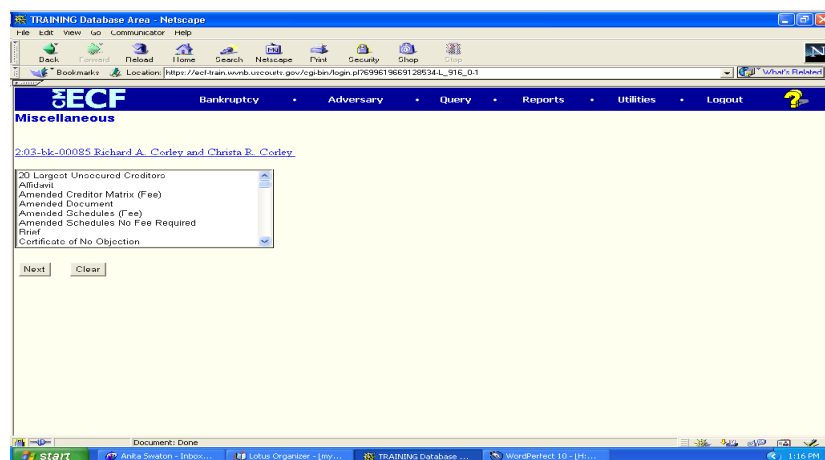


Figure 4

**STEP 5** The **Joint Filing** screen appears. (See Figure 5.)

- ◆ If you are filing this answer jointly with another attorney, click in the check box to indicate that. This will enable you to select the other attorney(s) later in this event.
- ◆ If this is **not** a joint filing, no further action is necessary.
- ◆ Click **[Next]** to continue.

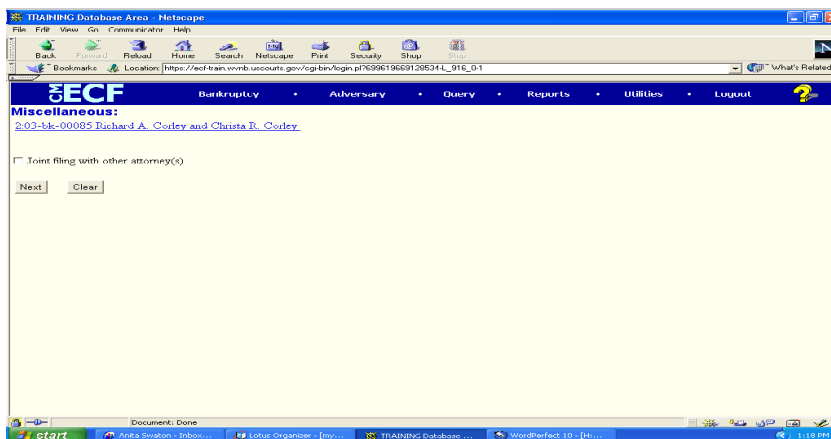


Figure 5

**STEP 6** The **SELECT PARTY** screen appears and displays all of the parties currently in the case. (See Figure 6.)

- ◆ Select the party filers. In this case you will select both debtors.
- ◆ Click **[Next]** to continue.

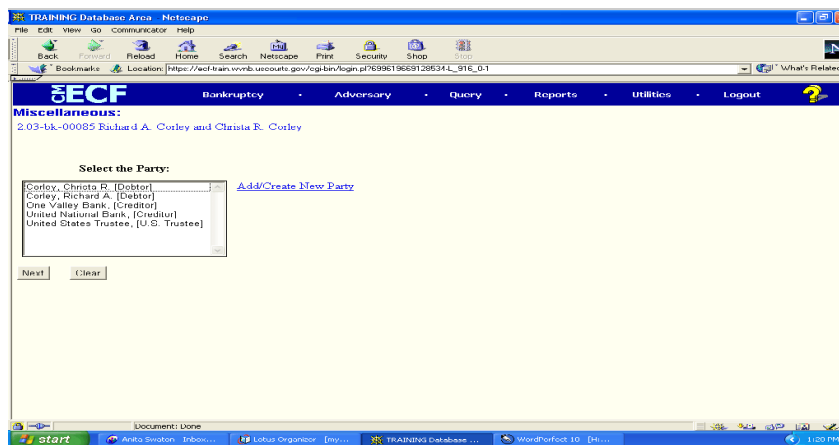
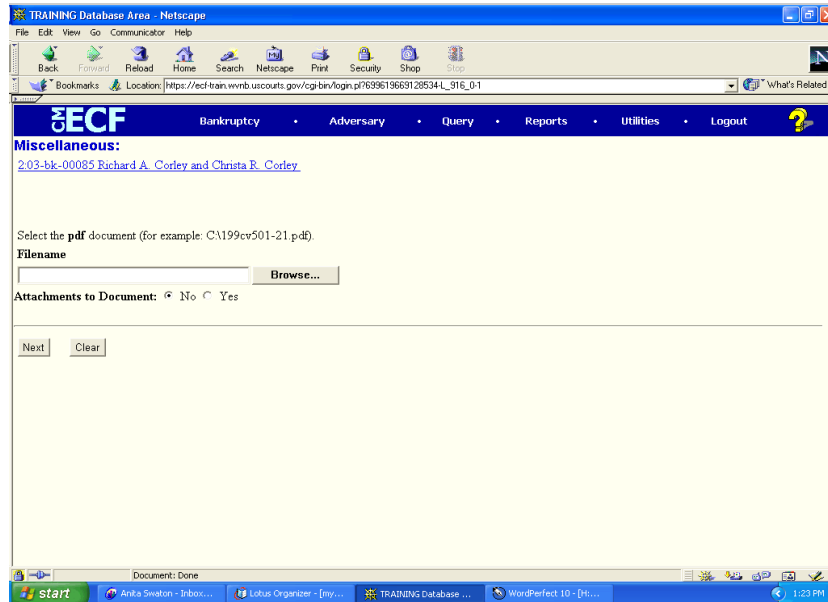


Figure 6

**STEP 7** The **PDF DOCUMENT** screen will then be presented.  
(See Figure 7.)



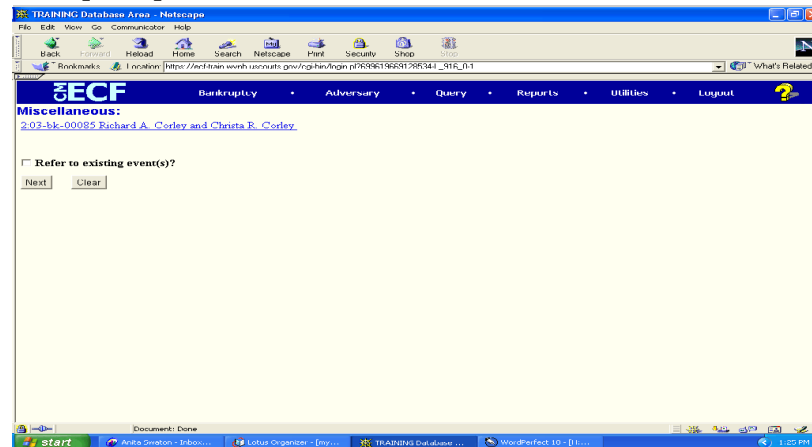
**Figure 7**

- ◆ To associate the imaged document with this entry:
  - Click **[Browse]**. In the **File Upload** window change **Files of type:** to **All Files (\*.\*)** Navigate to the directory where the appropriate PDF file is located and select it with your mouse.
  - To make certain you are about to associate the correct PDF file for this entry, right click on the filename with your mouse and select **Open**.
  - This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct.
  - Close or minimize the Adobe application and if that is the correct file, click Open on the File Upload dialogue box.
  - The system will enter the path and name of the PDF document selected into the Filename field.

**STEP 8** • Click **[Next]** to continue.  
The **Refer to Existing Event(s)?** screen displays. (See Figure 8.)

◆ Click in *Refer to existing event(s)?*

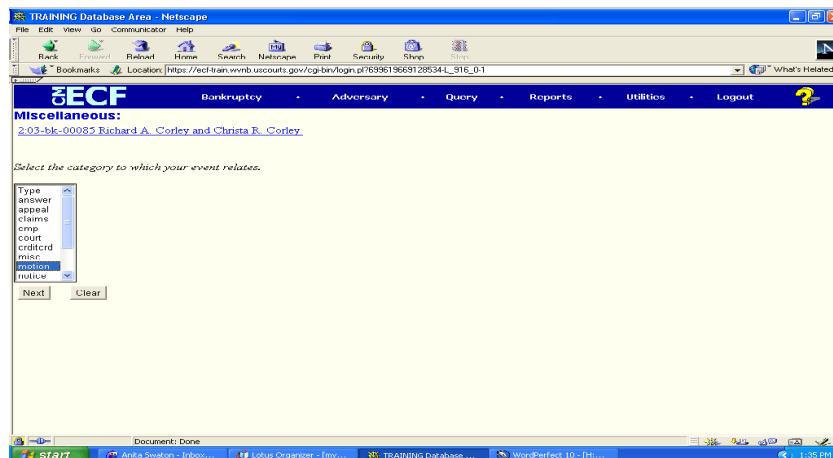
◆ Click **[Next]** to continue.



**Figure 8**

**STEP 9** The **Select the Category to Which Your Event Relates** screen appears. (See Figure 9.)

◆ For this lesson, click on motion.



**Figure 9**

NOTE: By holding down the Ctrl key and dragging your left mouse button down the entire list, all docket entries will appear on the

next screen.

- ◆ Click **[Next]** to continue.
- STEP 10** The **Select the Appropriate Event(s) to Which Your Event Relates:** screen appears. (See Figure 10.)
- ◆ Select the applicable event. In this lesson, we are selecting the Motion to Avoid Lien.
- ◆ Click **[Next]** to continue.

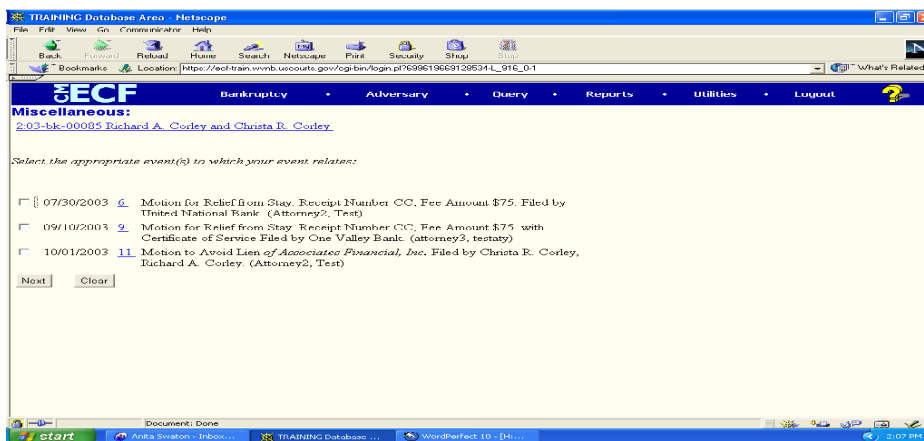


Figure 10

- STEP 11** The following screen displays. (See Figure 11.)
- ◆ This screen is not applicable when filing an affidavit in support of a motion to avoid lien.
- ◆ Click **[Next]** to continue.

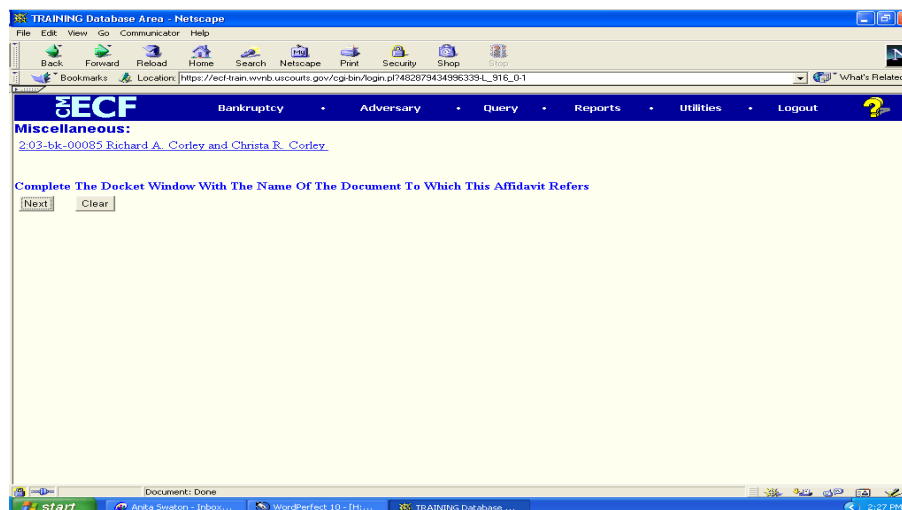


Figure 11

**STEP 12** The **MODIFY DOCKET TEXT** screen displays. (See Figure 12.)

- ◆ Docket text may be added in the white box. It is not necessary to insert any docket text in the white box when filing an affidavit in support of a motion to avoid lien.
- ◆ Click **[Next]** to continue.

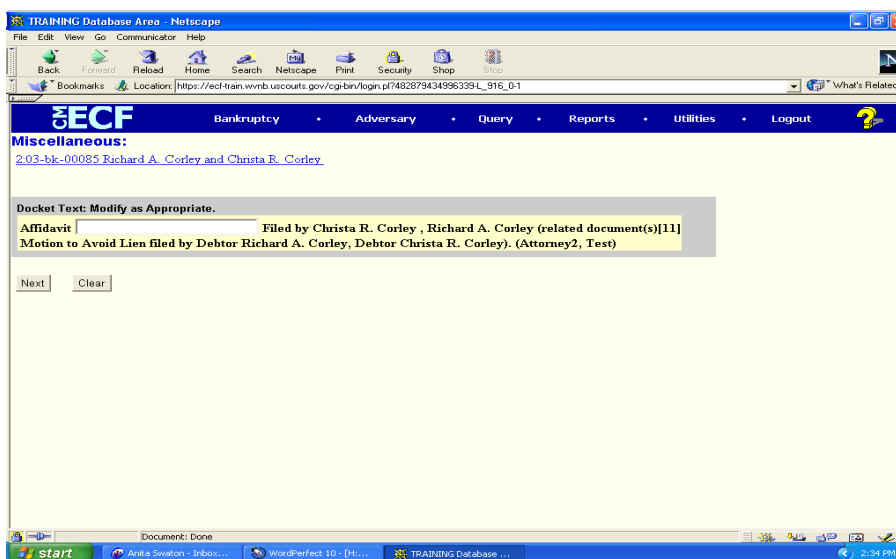
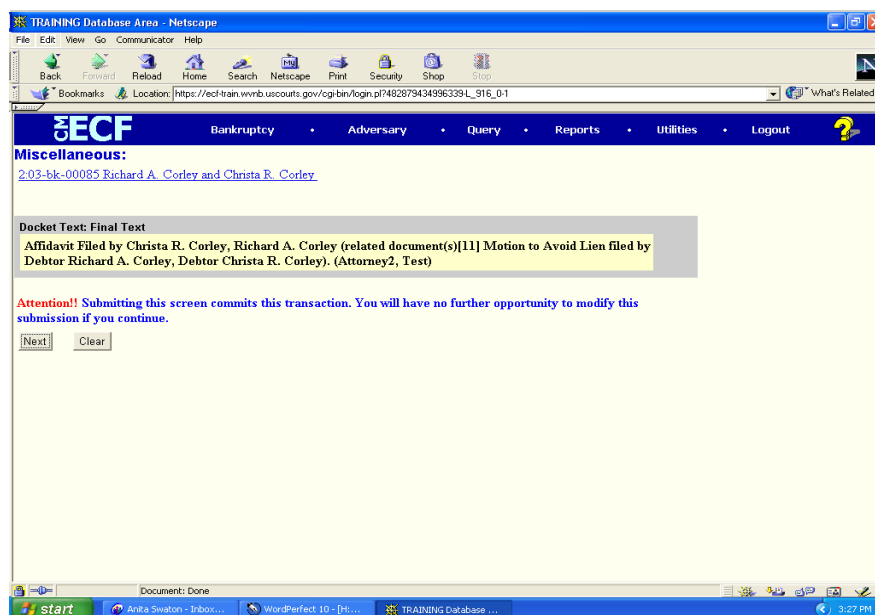


Figure 12

**STEP 13** The **FINAL DOCKET TEXT** screen displays. (See Figure 13.)

- ◆ Verify the accuracy of the docket text. This is what will print on the docket sheet. If the docket text has an error, click the browser's **[Back]** button at the top of the screen one or more times to access the screen on which the error was made, and correct the error.
- ◆ To abort or restart the transaction, click on the Bankruptcy hyperlink on the **CM/ECF Main Menu Bar**. Although this can be done at any time, this is your last opportunity to change the event.
- ◆ When the docket text is correct, click **[Next]** to continue.

**Figure 13****STEP 14** The **NOTICE OF ELECTRONIC FILING** screen displays. (See Figure 14.)

- ◆ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that this is now an official court document.

- ◆ Clicking on the case number hyperlink will display the PACER login screen. After logging into PACER, the docket report screen will appear.
- ◆ Clicking on the document number hyperlink will display the PACER login screen. After logging into PACER, the PDF document will appear.
- ◆ To print a copy of this notice, click the browser **[Print]** icon or button.
- ◆ To save a copy of this receipt, click **File** on the browser menu bar and select **Save Frame As**.

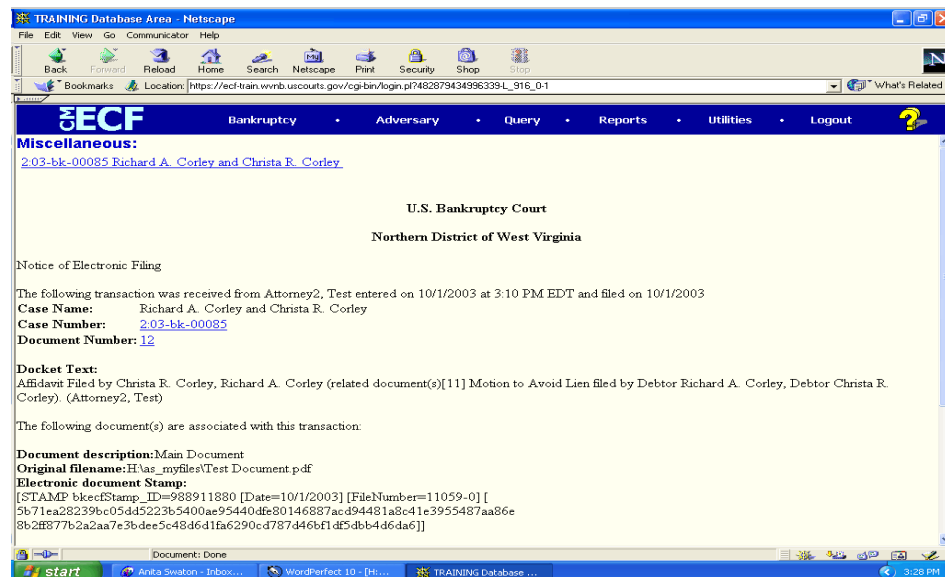


Figure 14

## Amended Document

This process shows the steps and screens required for an attorney to electronically file an amended document. To amend debtor schedules, refer to Section 6, *Amended Schedules*, in this Training Manual. To amend a plan or disclosure statement, refer to Section 7, *Reorganization*. If you are amending a notice, docket the pleading as a notice and choose the applicable prefix from the “pick list” in the Final Docket Text screen. This module demonstrates the steps to amend a Motion for Relief from Stay.

- STEP 1** Click on the Bankruptcy hyperlink on the CM/ECF Main Menu Bar. (See Figure 1.)

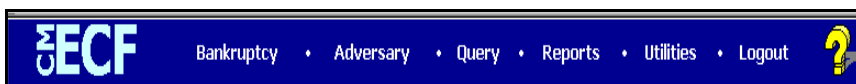


Figure 1

- STEP 2** The **BANKRUPTCY EVENTS** screen displays. (See Figure 2.)

- ◆ Click on the Other hyperlink.

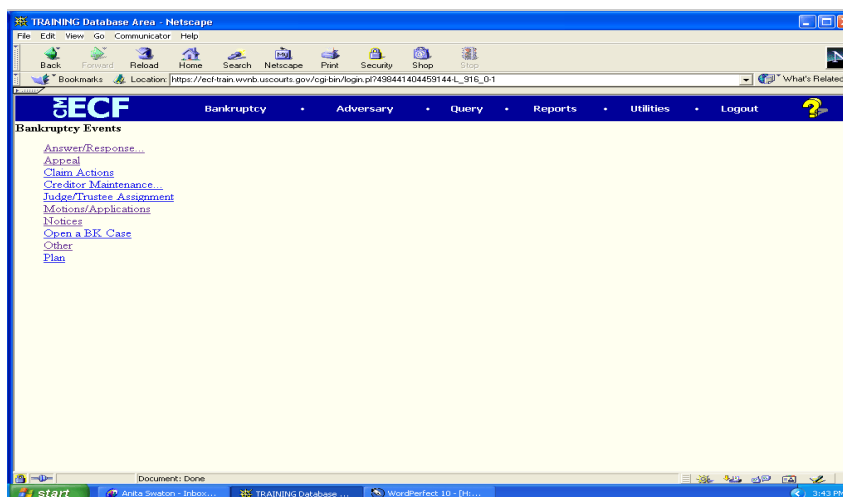
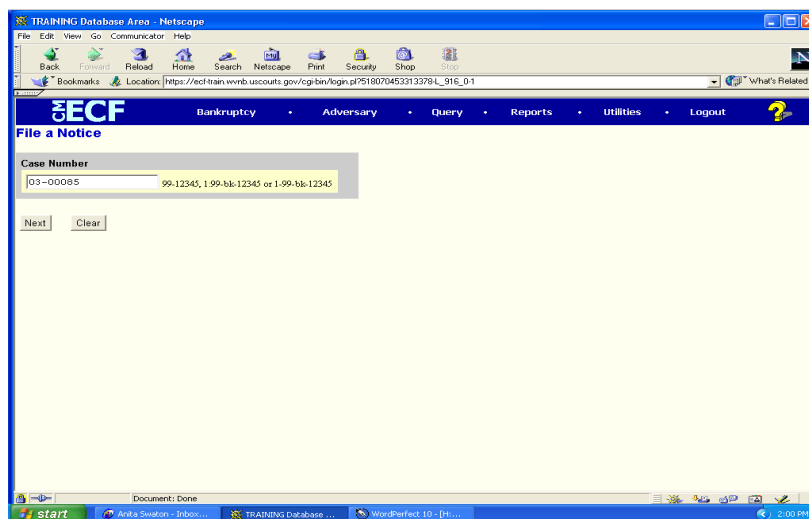


Figure 2

**STEP 3** The **CASE NUMBER** screen displays (See Figure 3). The system will display the number of the last case you accessed in this session.

- ◆ If this is **not** the case in which you are filing the amended document, delete this case number and enter the correct case number using yy-nnnnn format.
- ◆ Click **[Next]** to continue.



**Figure 3**

**STEP 4** The **Event Type** screen displays. (See Figure 4.)

- ◆ Select Amended Document.
- ◆ Click **[Next]** to continue.

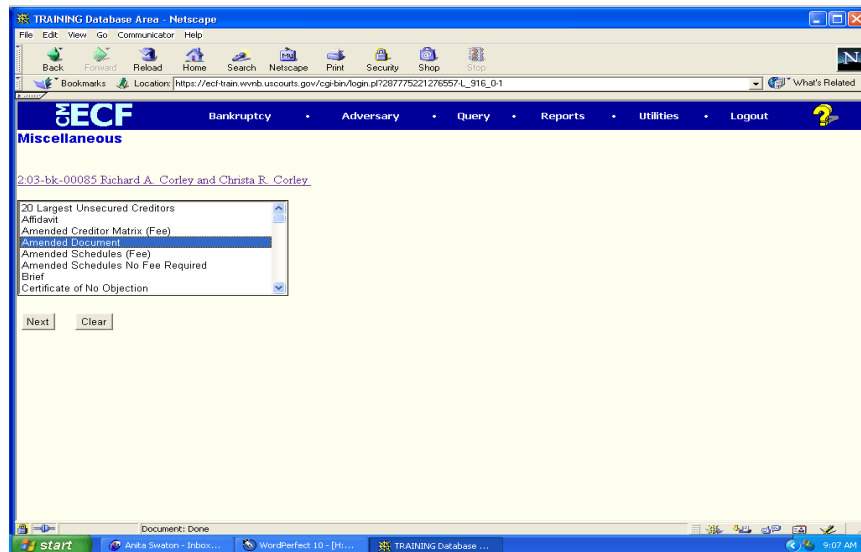


Figure 4

**STEP 5** The **Joint Filing** screen appears. (See Figure 5.)

- ◆ If you are filing this pleading jointly with another attorney, click in the check box to indicate that. This will enable you to select the other attorney(s) later in this event.
- ◆ If this is **not** a joint filing, no further action is necessary.
- ◆ Click **[Next]** to continue.

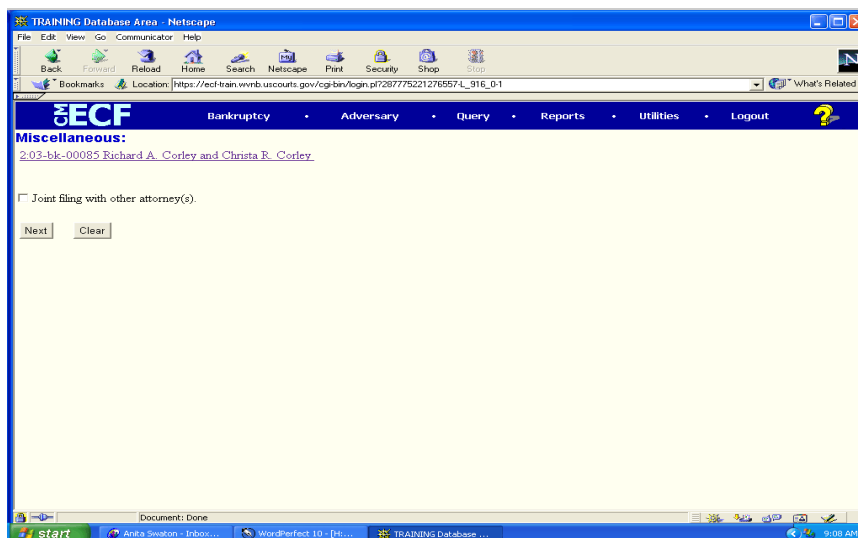


Figure 5

**STEP 6** The **SELECT PARTY** screen appears and displays all of the parties currently in the case. (See Figure 6.)

- ◆ Click on the party filing the amended document.
- ◆ Click **[Next]** to continue.

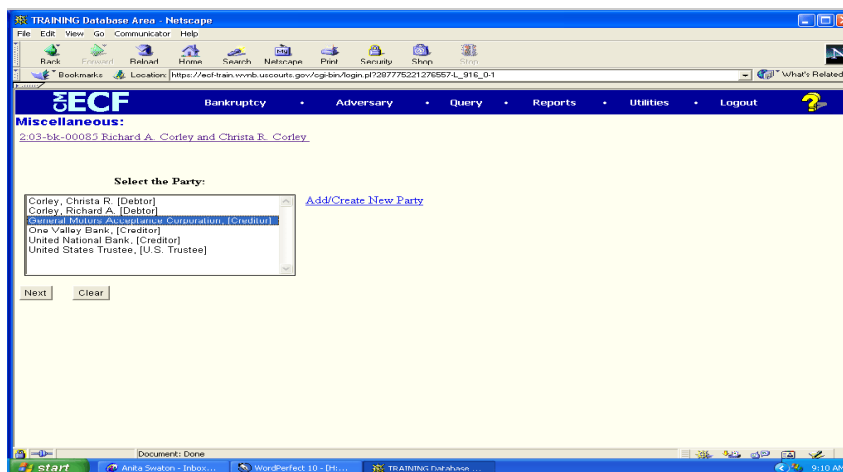
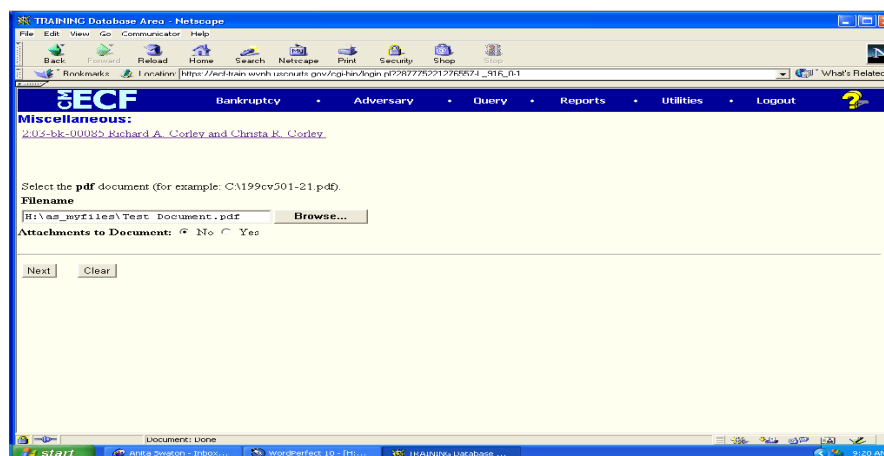


Figure 6

**STEP 7** The **PDF DOCUMENT** screen will then be presented. (See Figure 7.)

- ◆ To associate the imaged document with this entry:
  - Click **[Browse]**. In the **File Upload** window change **Files of type:** to **All Files (\*.\*)** Navigate to the directory where the appropriate PDF file is located and select it with your mouse.
  - To make certain you are about to associate the correct PDF file for this entry, right click on the filename with your mouse and select **Open**.
  - This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct.
  - Close or minimize the Adobe application and if that is the correct file, click Open on the File Upload dialogue box.
  - The system will enter the path and name of the PDF document selected into the Filename field.
- ◆ Click **[Next]** to continue.

**Figure 7**

**STEP 8** The **Refer to Existing Event(s)?** screen appears. (See Figure 8.) This screen reminds you to relate the amended document to the original document.

- ◆ Click in ***Refer to existing event(s)?***

- ◆ Click **[Next]** to continue.

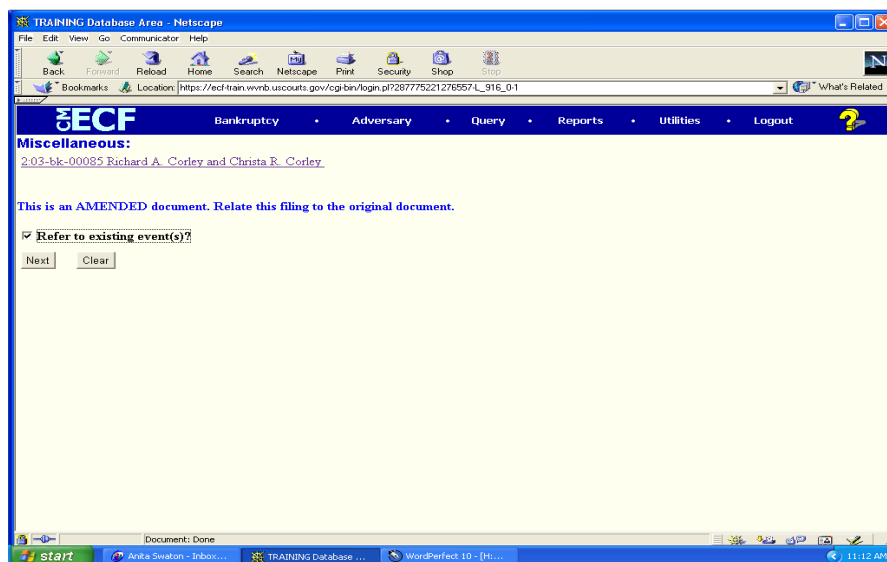


Figure 8

- STEP 9** The **Select the Category to Which Your Event Relates** screen appears. (See Figure 9.)

- ◆ Select **motion**.
- ◆ Click **[Next]** to continue.

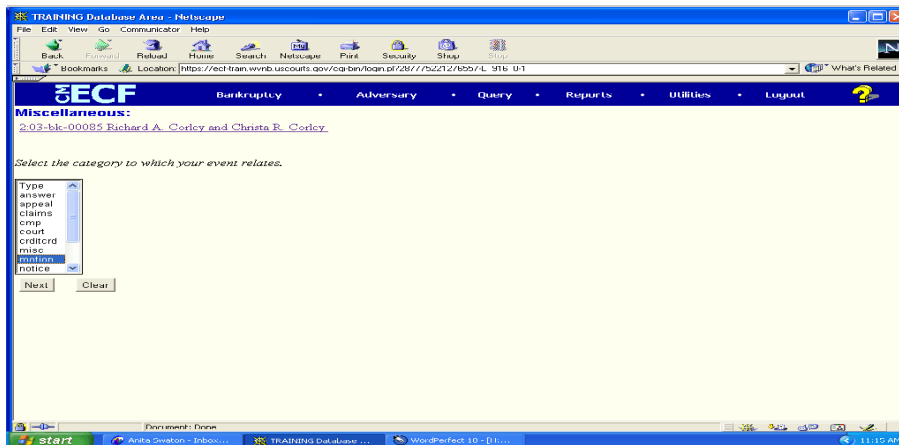


Figure 9

- STEP 10** The **Select the Appropriate Event(s) to Which Your Event Relates** screen appears. (See Figure 10.)

- ◆ Select the appropriate document to link to the amended document.
- ◆ Click **[Next]** to continue.

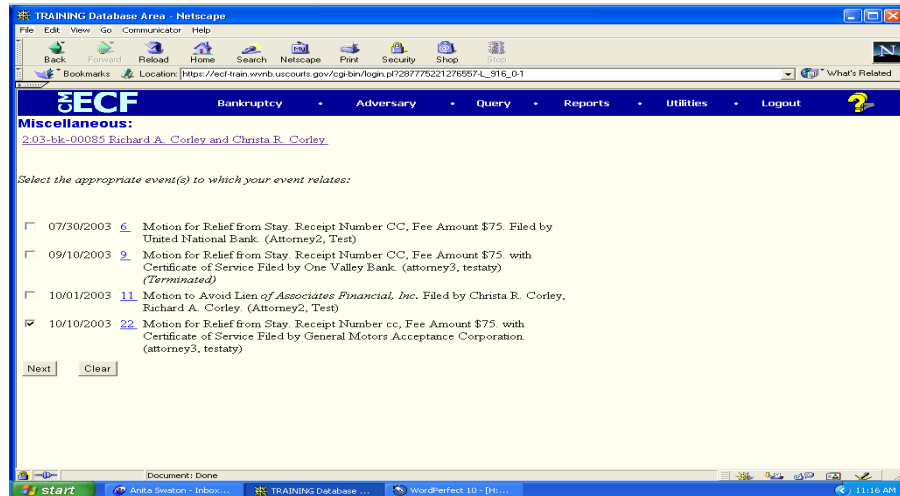


Figure 10

**STEP 11** The **FINAL TEXT EDITING** screen displays. (See Figure 11.)

- ◆ Insert language in docket text to reflect the document you are filing. For this lesson, insert ***Motion for Relief from Stay***.
- ◆ Verify the accuracy of the docket text. This is what will print on the docket sheet. If the docket text has an error, click the browser's **[Back]** button at the top of the screen one or more times to access the screen on which the error was made, and correct the error.
- ◆ To abort or restart the transaction, click on the Bankruptcy hyperlink on the **CM/ECF Main Menu Bar**. Although this can be done at any time, this is your last opportunity to change the event.
- ◆ When the docket text is correct, click **[Next]** to continue.

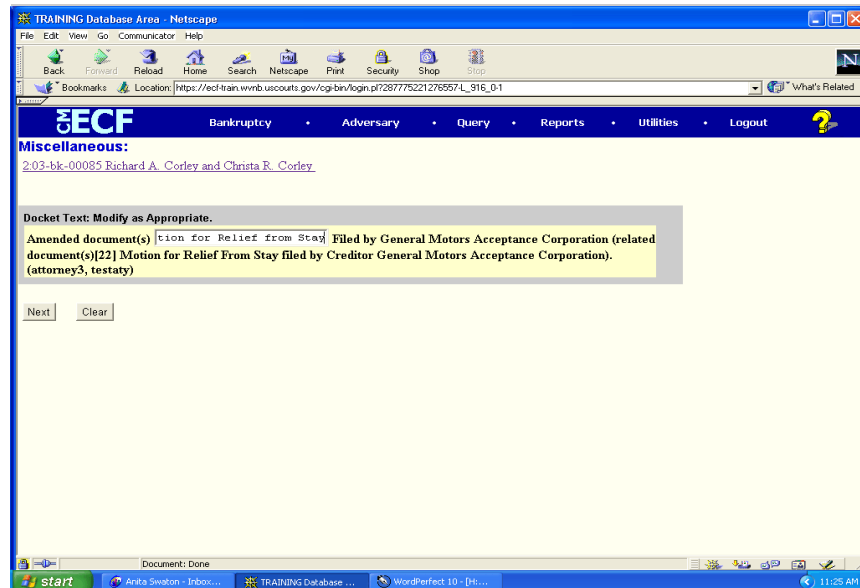


Figure 11

**STEP 12** The **FINAL DOCKET TEXT** screen displays. (See Figure 12.)

- ◆ Read the **Attention!!** message.
- ◆ If you are ready to submit this transaction click **[Next]**.

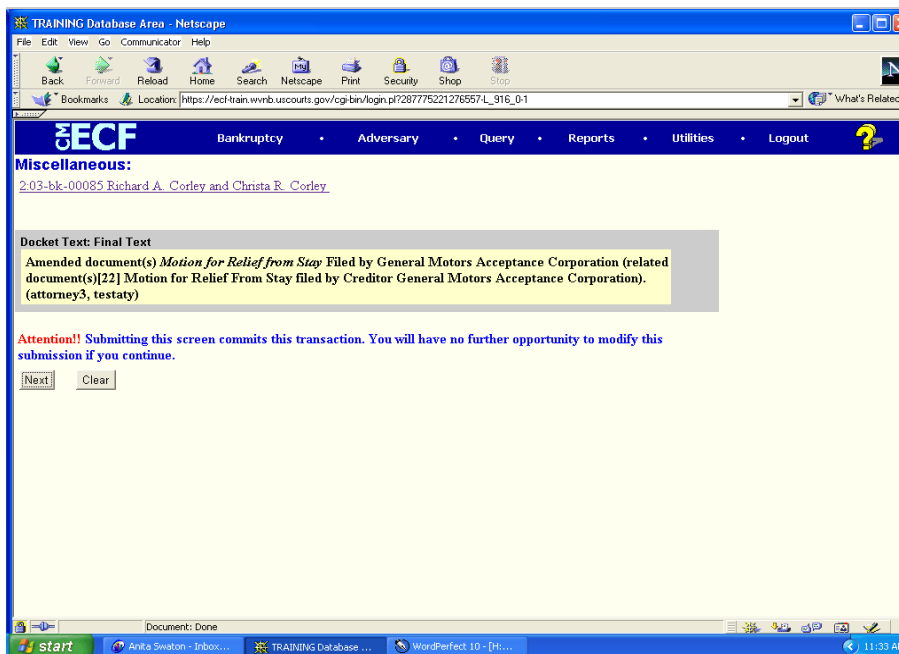


Figure 12

**STEP 13** The **NOTICE OF ELECTRONIC FILING** screen displays.  
(See Figure 13.)

- ◆ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that this is now an official court document.
- ◆ Clicking on the case number hyperlink will display the PACER login screen. After logging into PACER, the docket report screen will appear.
- ◆ Clicking on the document number hyperlink will display the PACER login screen. After logging into PACER, the PDF document will appear.
- ◆ To print a copy of this notice, click the browser **[Print]** icon or button.
- ◆ To save a copy of this receipt, click **File** on the browser menu bar and select **Save Frame As**.

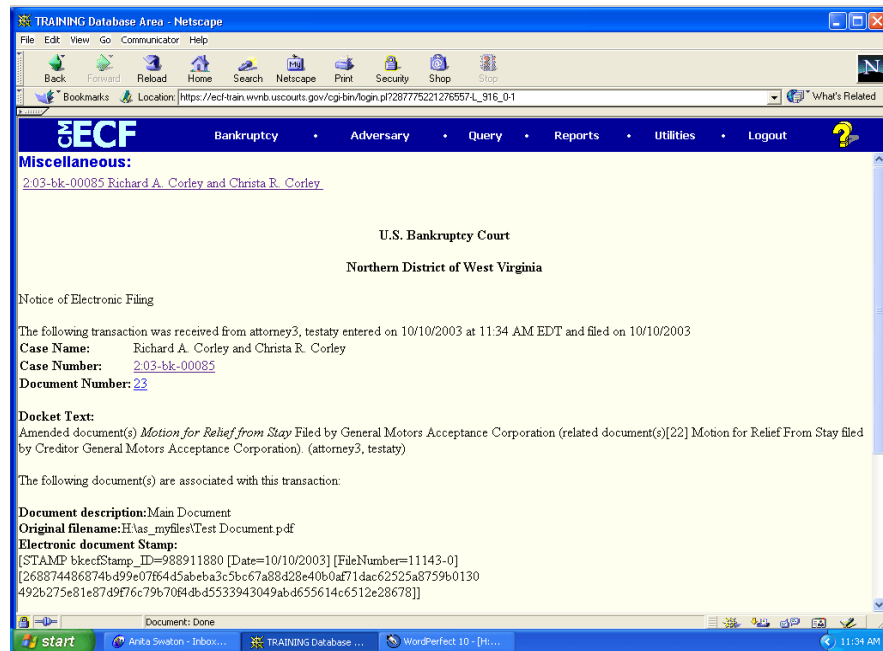
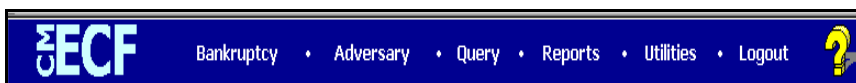


Figure 13

## Certificate of Service

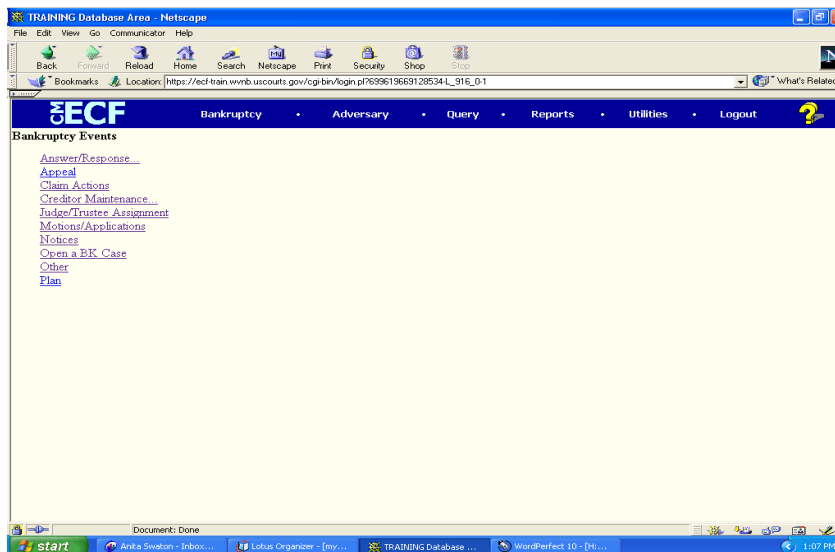
This process shows the steps and screens required for an attorney to electronically file a certificate of service. This lesson will demonstrate the filing of a certificate of service evidencing service of a brief.

- STEP 1** Click on the Bankruptcy hyperlink on the CM/ECF Main Menu Bar. (See Figure 1.)



**Figure 1**

- STEP 2** The **BANKRUPTCY EVENTS** screen displays. (See Figure 2.)

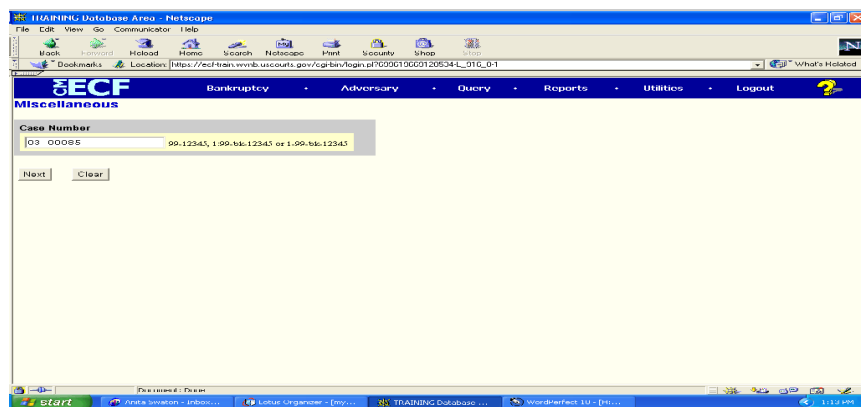


**Figure 2**

- ◆ Click on the Other hyperlink.

**STEP 3** The **CASE NUMBER** screen displays (See Figure 3). The system will display the number of the last case you accessed in this session.

- ◆ If this is **not** the case in which you are filing an answer, delete this case number and enter the correct case number using yy-nnnnn format.
- ◆ Click **[Next]** to continue.



**Figure 3**

**STEP 4** The **Miscellaneous** screen appears. (See Figure 4.)

- ◆ Click on **Certificate of Service**.
- ◆ Click **[Next]** to continue.

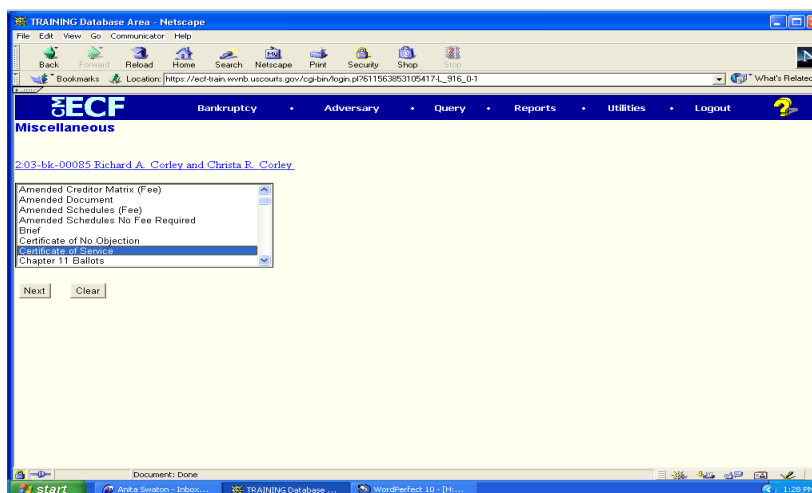


Figure 4

**STEP 5** The **Joint Filing** screen appears. (See Figure 5.)

- ◆ If you are filing this pleading jointly with another attorney, click in the check box to indicate that. This will enable you to select the other attorney(s) later in this event.
- ◆ If this is **not** a joint filing, no further action is necessary.
- ◆ Click [**Next**] to continue.

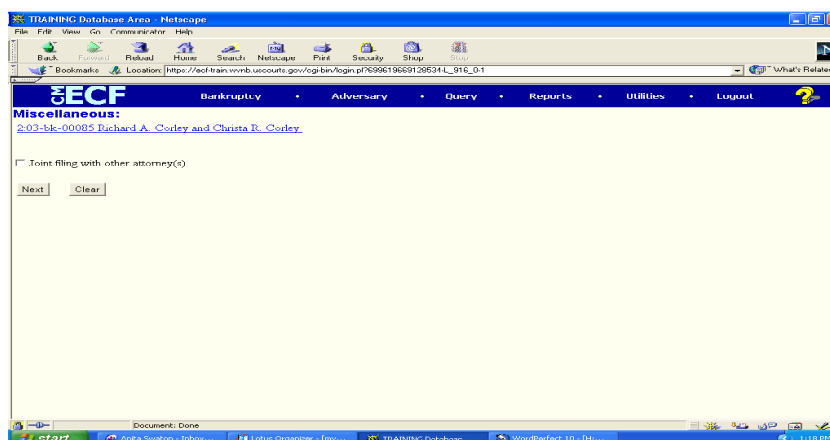


Figure 5

**STEP 6** The **SELECT PARTY** screen appears and displays all of the parties currently in the case. (See Figure 6.)

- ◆ Select the party filers. In this case you will select United National Bank.
- ◆ Click **[Next]** to continue.

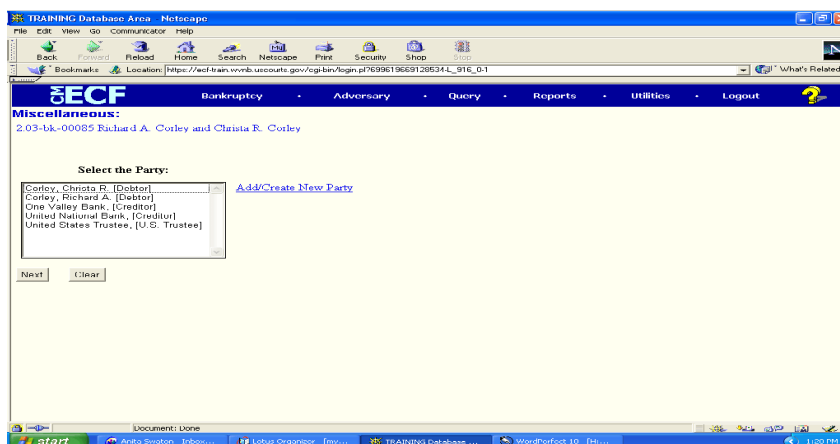


Figure 6

**STEP 7** The **PDF DOCUMENT** screen displays. (See Figure 7.)

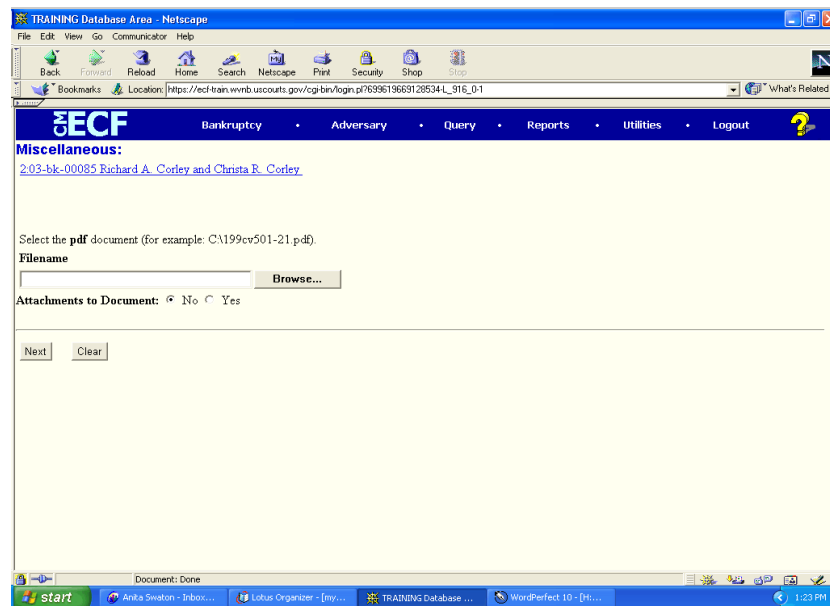


Figure 7

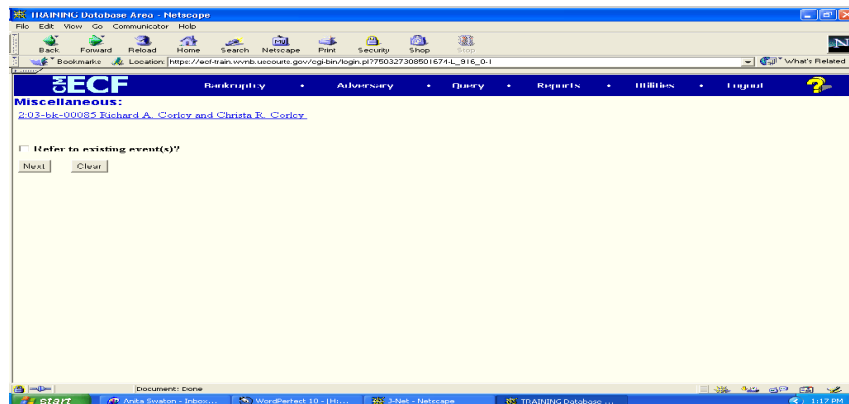
- ◆ To associate the imaged document with this entry:
  - Click **[Browse]**. In the **File Upload** window change **Files of type:** to **All Files (\*.\*)** Navigate to the directory where

the appropriate PDF file is located and select it with your mouse.

- To make certain you are about to associate the correct PDF file for this entry, right click on the filename with your mouse and select **Open**.
- This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct.
- Close or minimize the Adobe application and if that is the correct file, click Open on the File Upload dialogue box.
- The system will enter the path and name of the PDF document selected into the Filename field.
- Click **[Next]** to continue.

**STEP 8** The **Refer to Existing Event(s)?** screen displays. (See Figure 8.)

- ◆ Click in *Refer to existing event(s)?*
- ◆ Click **[Next]** to continue.



**Figure 8**

**STEP 9** The **Select the Category to Which Your Event Relates** screen appears. (See Figure 9.)

- ◆ For this lesson, click on misc.

mouse

NOTE: By holding down the Ctrl key and dragging your left button down the entire list, all docket entries will appear on the next screen.

- ◆ Click **[Next]** to continue.

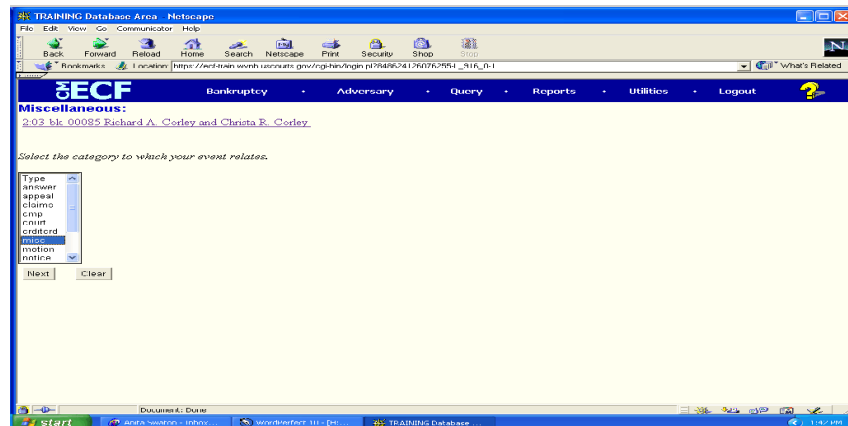


Figure 9

**STEP 10** The **Select the Appropriate Event(s) to Which Your Event Relates:** screen appears. (See Figure 10.)

- ◆ Select the applicable event. In this lesson, we are selecting pleading number 13, Brief.
- ◆ Click **[Next]** to continue.

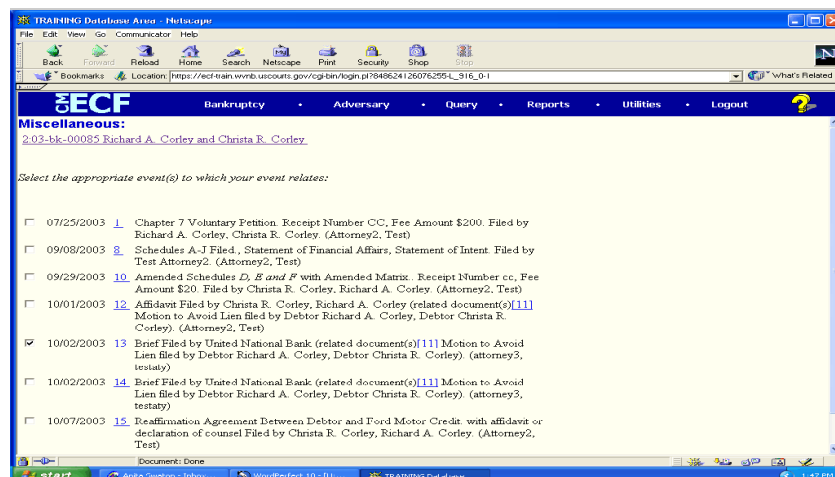
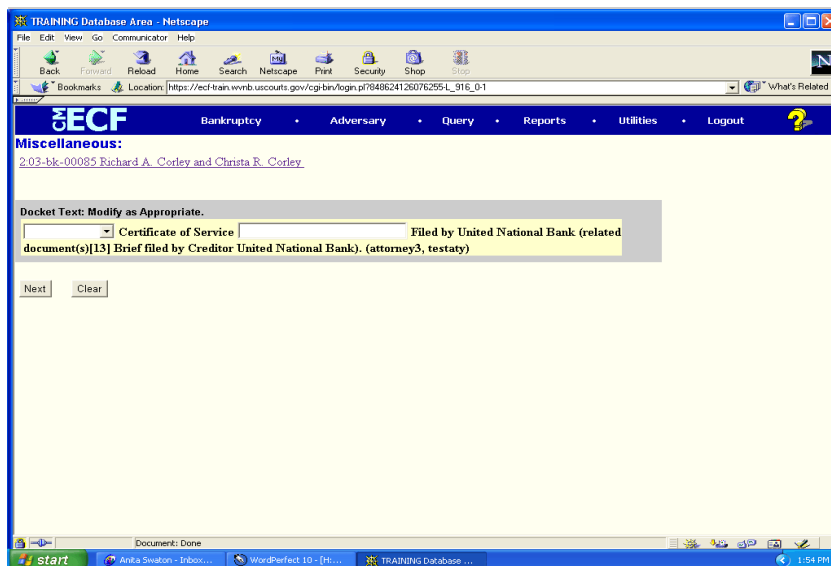


Figure 10

**STEP 11** The **MODIFY DOCKET TEXT** screen displays. (See Figure 11a.)

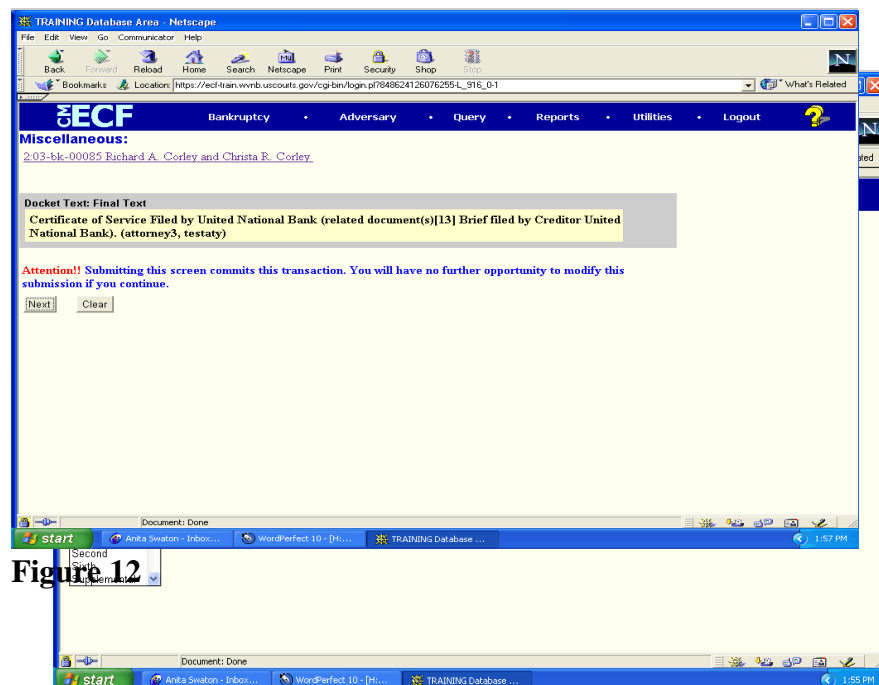
- ◆ Docket text may be added in the white box if applicable.
- ◆ A prefix may be added to the docket text by clicking on the down arrow. (See Figure 11b.)
- ◆ Click **[Next]** to continue.



**Figure 11a**

**STEP 12** The **FINAL DOCKET TEXT** screen displays. (See Figure 12.)

- ◆ Verify the accuracy of the docket text. This is what will print on the docket sheet. If the docket text has an error, click the browser's **[Back]** button at the top of the screen one or more times to access the screen on which the error was made, and correct the error.
- ◆ To abort or restart the transaction, click on the Bankruptcy hyperlink on the **CM/ECF Main Menu Bar**. Although this can be done at any time, this is your last opportunity to change the event.
- ◆ When the docket text is correct, click **[Next]** to continue.

**Figure 12****Figure 11b****STEP 13** The **NOTICE OF ELECTRONIC FILING** screen displays. (See Figure 13.)

- ◆ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that this is now an official court document.

- ◆ Clicking on the case number hyperlink will display the PACER login screen. After logging into PACER, the docket report screen will appear.
- ◆ Clicking on the document number hyperlink will display the PACER login screen. After logging into PACER, the PDF document will appear.
- ◆ To print a copy of this notice, click the browser **[Print]** icon or button.
- ◆ To save a copy of this receipt, click **File** on the browser menu bar and select **Save Frame As**.

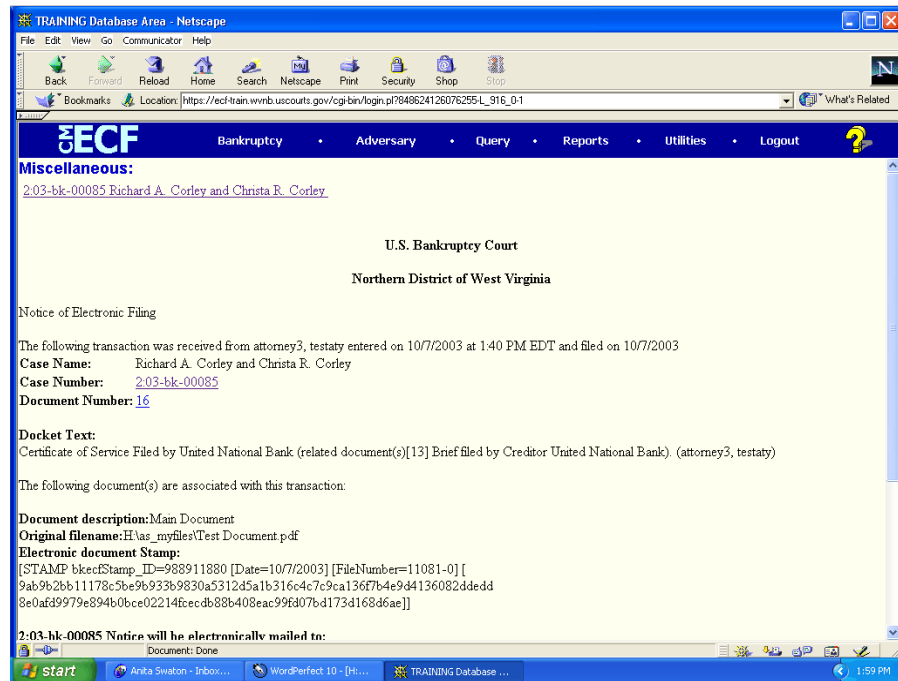
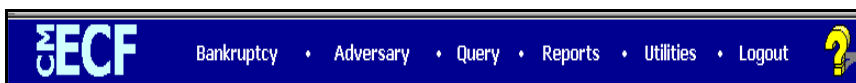


Figure 13

## Memorandum in Support/Opposition

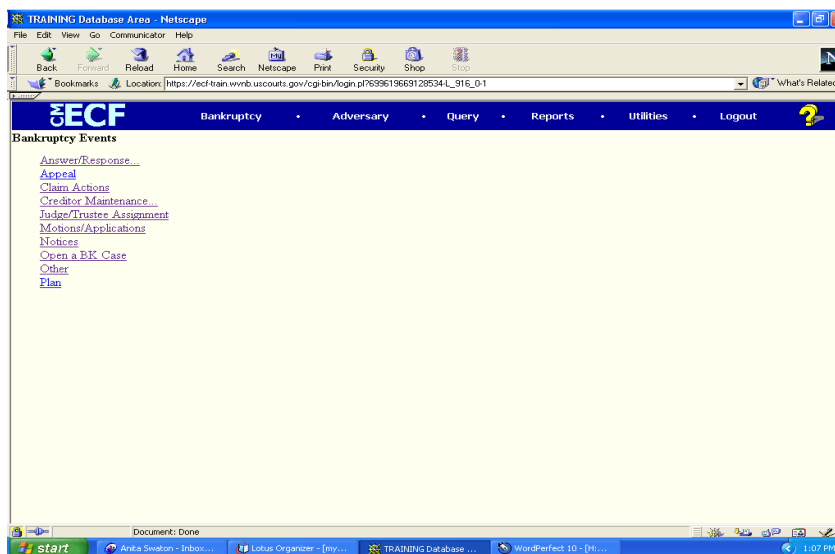
This process shows the steps and screens required for an attorney to electronically file a memorandum of law. This lesson will demonstrate the filing of a memorandum in opposition to a motion to avoid lien.

**STEP 1** Click on the Bankruptcy hyperlink on the CM/ECF Main Menu Bar. (See Figure 1.)



**Figure 1**

**STEP 2** The **BANKRUPTCY EVENTS** screen displays. (See Figure 2.)



**Figure 2**

◆ Click on the Other hyperlink.

**STEP 3** The **CASE NUMBER** screen displays (See Figure 3). The system will display the number of the last case you accessed in this session.

- ◆ If this is **not** the case in which you are filing an answer, delete this case number and enter the correct case number using yy-nnnnn format.
- ◆ Click **[Next]** to continue.

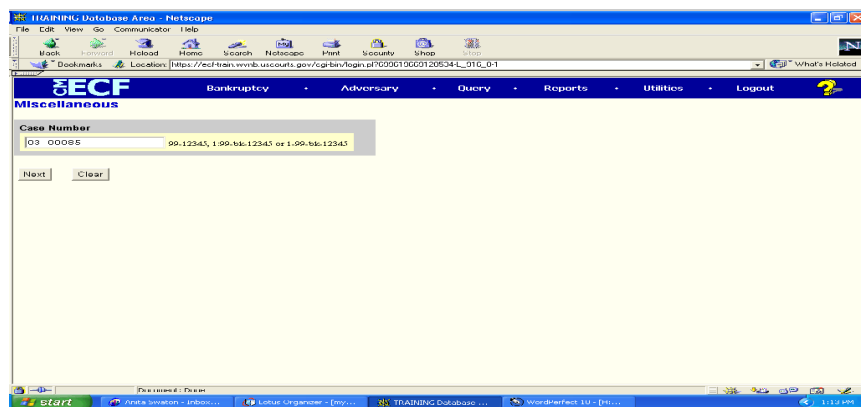


Figure 3

**STEP 4** The **Miscellaneous** screen appears. (See Figure 4.)

- ◆ Click on **Brief**.
- ◆ Click **[Next]** to continue.

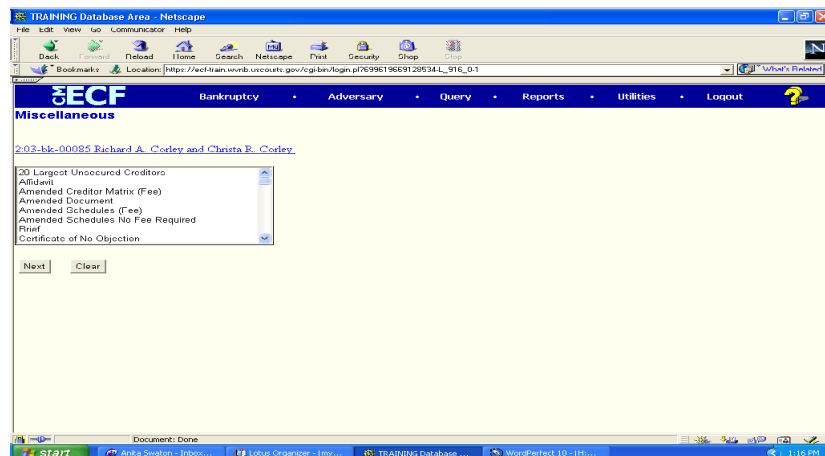
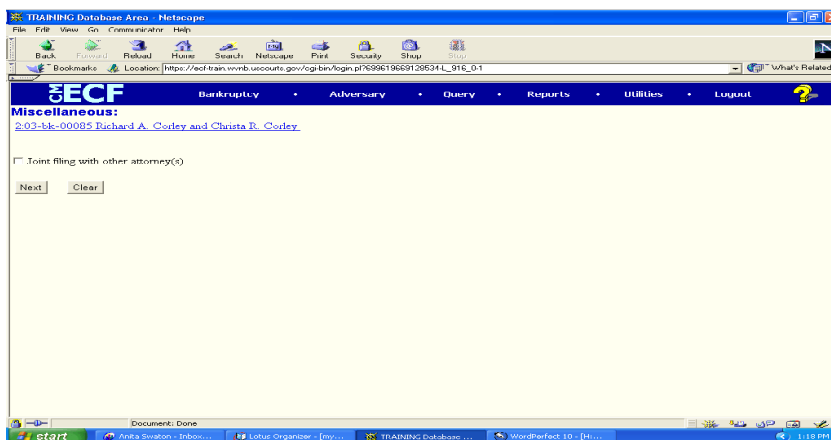


Figure 4

**STEP 5** The **Joint Filing** screen appears. (See Figure 5.)

- ◆ If you are filing this pleading jointly with another attorney, click in the check box to indicate that. This will enable you to select the other attorney(s) later in this event.
- ◆ If this is **not** a joint filing, no further action is necessary.
- ◆ Click **[Next]** to continue.

**Figure 5****STEP 6** The **SELECT PARTY** screen appears and displays all of the parties currently in the case. (See Figure 6.)

- ◆ Select the party filers. In this case you will select United National Bank.
- ◆ Click **[Next]** to continue.

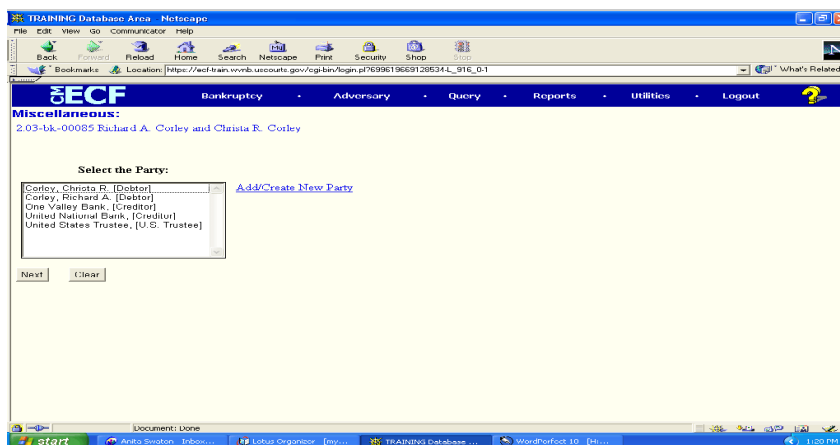


Figure 6

**STEP 7** The **ATTORNEY/PARTY ASSOCIATIONS** screen appears. (See Figure 7.)

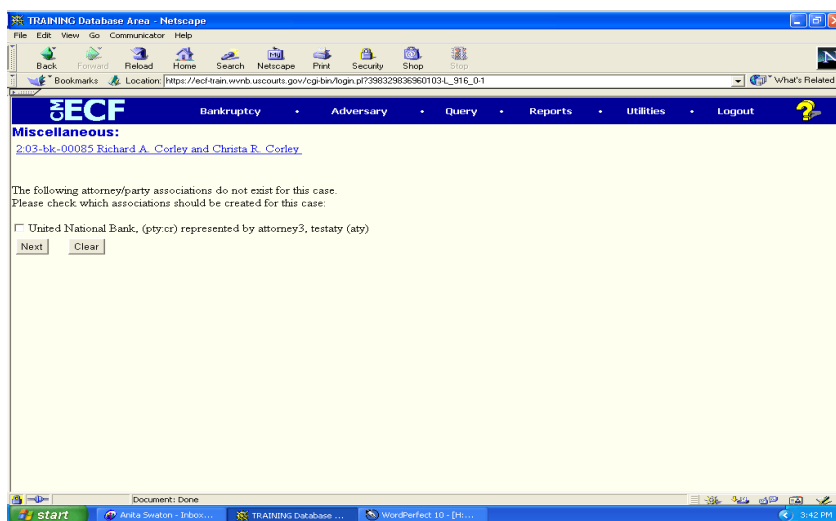


Figure 7

- ◆ Click the box to establish the association between you and United National Bank in this case.
- ◆ Click **[Next]** to continue.

**STEP 8** The **PDF DOCUMENT** screen displays. (See Figure 8.)

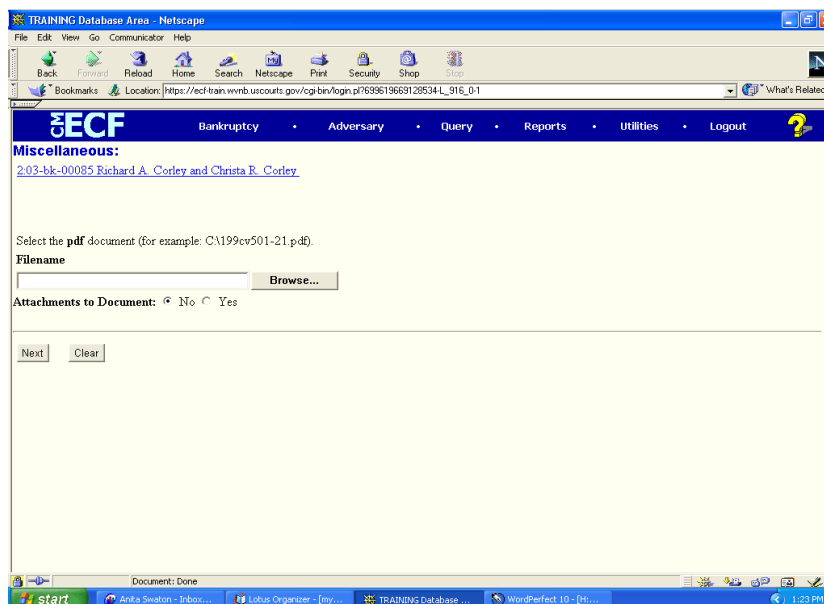
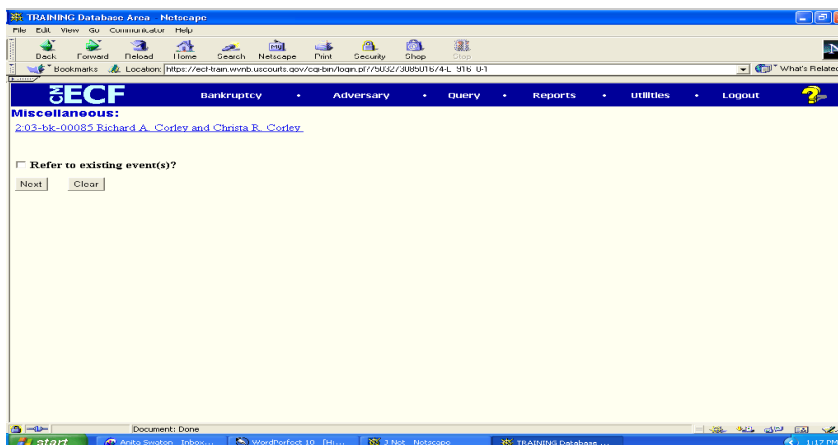


Figure 8

- ◆ To associate the imaged document with this entry:
  - Click **[Browse]**. In the **File Upload** window change **Files of type:** to **All Files (\*.\*)** Navigate to the directory where the appropriate PDF file is located and select it with your mouse.
  - To make certain you are about to associate the correct PDF file for this entry, right click on the filename with your mouse and select **Open**.
  - This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct.
  - Close or minimize the Adobe application and if that is the correct file, click Open on the File Upload dialogue box.
  - The system will enter the path and name of the PDF document selected into the Filename field.
  - Click **[Next]** to continue.

**STEP 9** The **Refer to Existing Event(s)?** screen displays. (See Figure 9.)

- ◆ Click in *Refer to existing event(s)?*
- ◆ Click **[Next]** to continue.



**Figure 9**

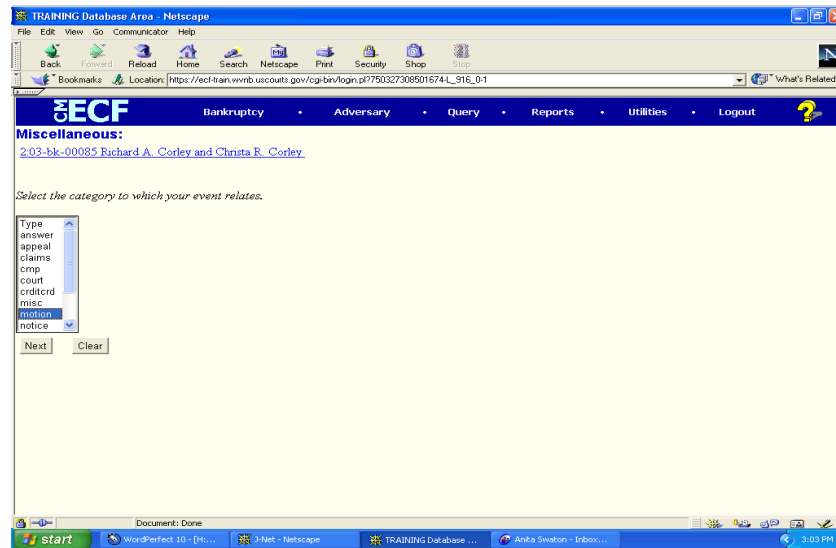
**STEP 10** The **Select the Category to Which Your Event Relates** screen appears. (See Figure 10.)

- ◆ For this lesson, click on motion.

mouse

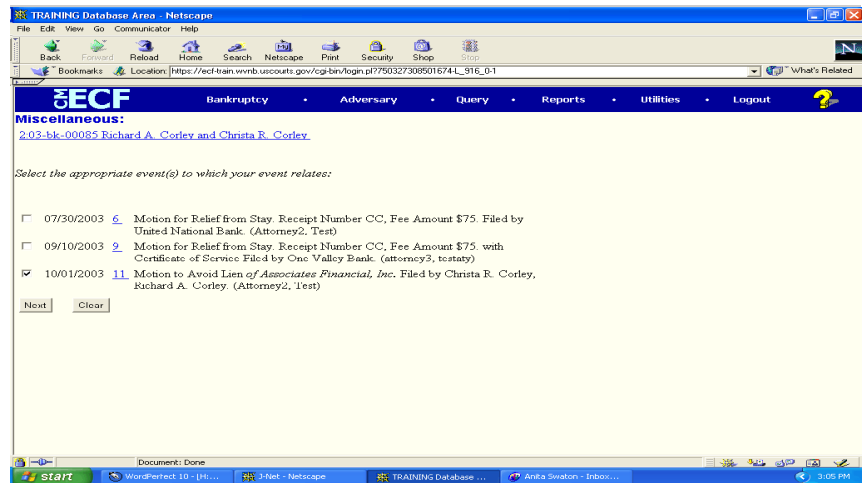
NOTE: By holding down the Ctrl key and dragging your left button down the entire list, all docket entries will appear on the next screen.

- ◆ Click **[Next]** to continue.

**Figure 10**

**STEP 11**      The **Select the Appropriate Event(s) to Which Your Event Relates:** screen appears. (See Figure 11.)

- ◆ Select the applicable event. In this lesson, we are selecting the Motion to Avoid Lien.
- ◆ Click **[Next]** to continue.

**Figure 11**

**STEP 12** The **MODIFY DOCKET TEXT** screen displays. (See **Figure 12a.**)

- ◆ Docket text may be added in the white box.
- ◆ A prefix may be added to the docket text by clicking on the down arrow. (See **Figure 12b.**)
- ◆ Click **[Next]** to continue.

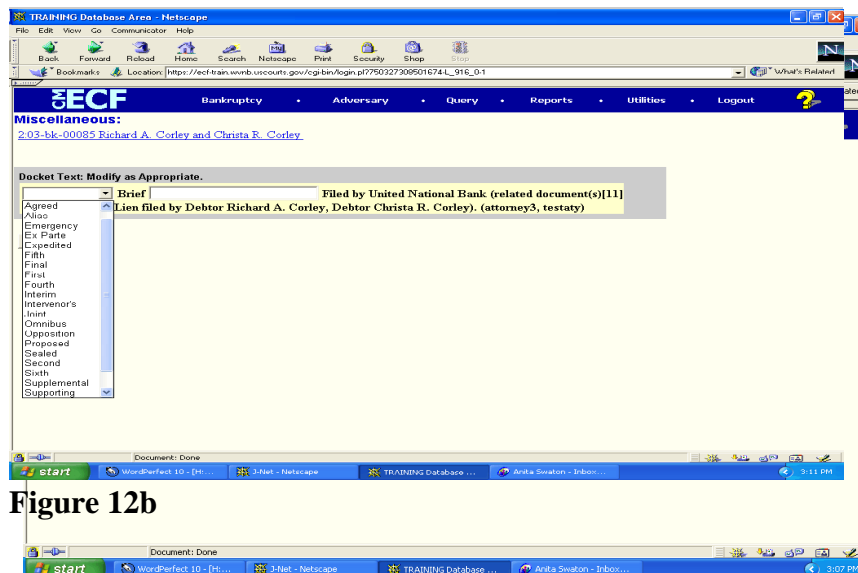


Figure 12b

Figure 12a

**STEP 13** The **FINAL DOCKET TEXT** screen displays. (See Figure 13.)

- ◆ Verify the accuracy of the docket text. This is what will print on the docket sheet. If the docket text has an error, click the browser's **[Back]** button at the top of the screen one or more times to access the screen on which the error was made, and correct the error.
- ◆ To abort or restart the transaction, click on the Bankruptcy hyperlink on the **CM/ECF Main Menu Bar**. Although this can be done at any time, this is your last opportunity to change the event.
- ◆ When the docket text is correct, click **[Next]** to continue.

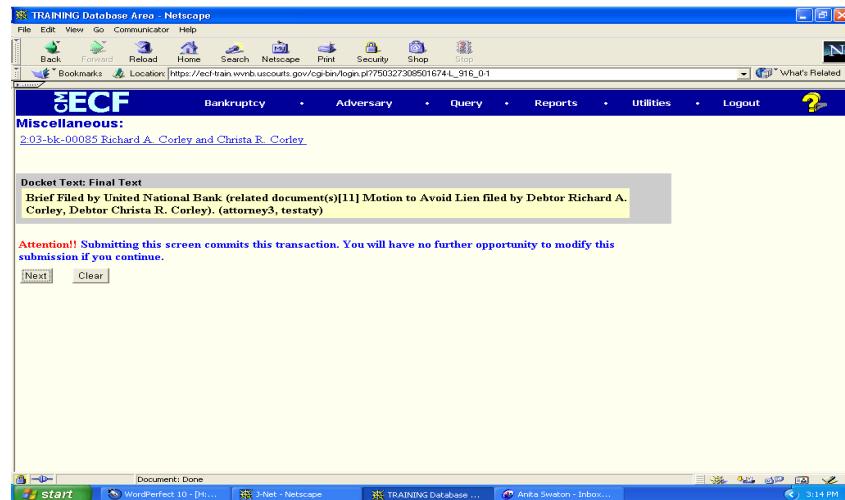


Figure 13

- STEP 14**      The **NOTICE OF ELECTRONIC FILING** screen displays.  
(See Figure 14.)
- ◆ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that this is now an official court document.
  - ◆ Clicking on the case number hyperlink will display the PACER login screen. After logging into PACER, the docket report screen will appear.
  - ◆ Clicking on the document number hyperlink will display the PACER login screen. After logging into PACER, the PDF document will appear.
  - ◆ To print a copy of this notice, click the browser **[Print]** icon or button.
  - ◆ To save a copy of this receipt, click **File** on the browser menu bar and select **Save Frame As**.

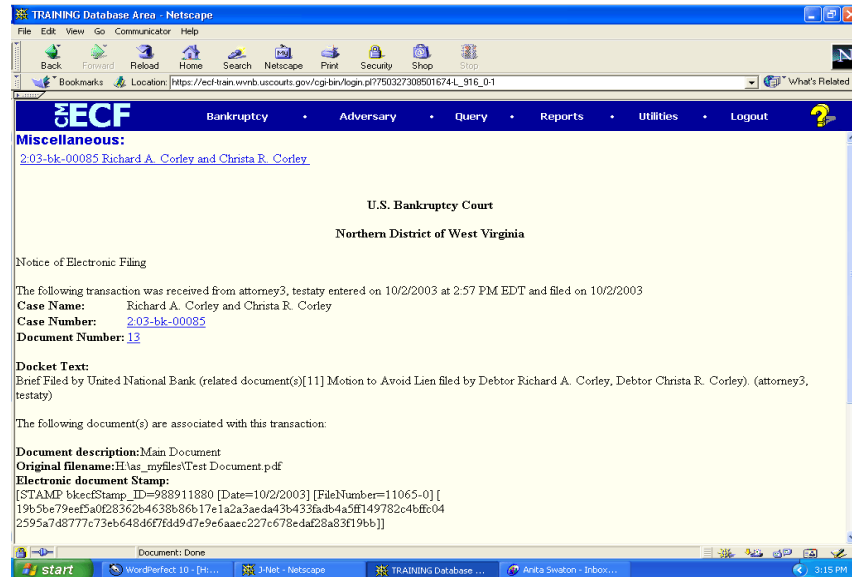
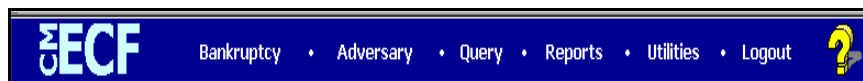


Figure 14

# Reaffirmation Agreement

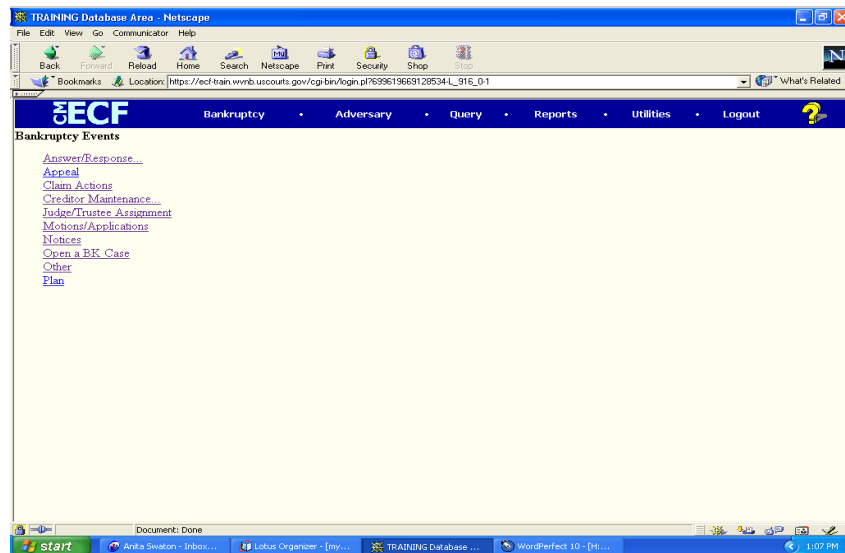
This process shows the steps and screens required for an attorney to electronically file a reaffirmation agreement.

- STEP 1** Click on the Bankruptcy hyperlink on the CM/ECF Main Menu Bar. (See Figure 1.)



**Figure 1**

- STEP 2** The **BANKRUPTCY EVENTS** screen displays. (See Figure 2.)



**Figure 2**

- ◆ Click on the Other hyperlink.

**STEP 3** The **CASE NUMBER** screen displays (See Figure 3). The system will display the number of the last case you accessed in this session.

- ◆ If this is **not** the case in which you are filing an answer, delete this case number and enter the correct case number using yynn timer format.
- ◆ Click **[Next]** to continue.

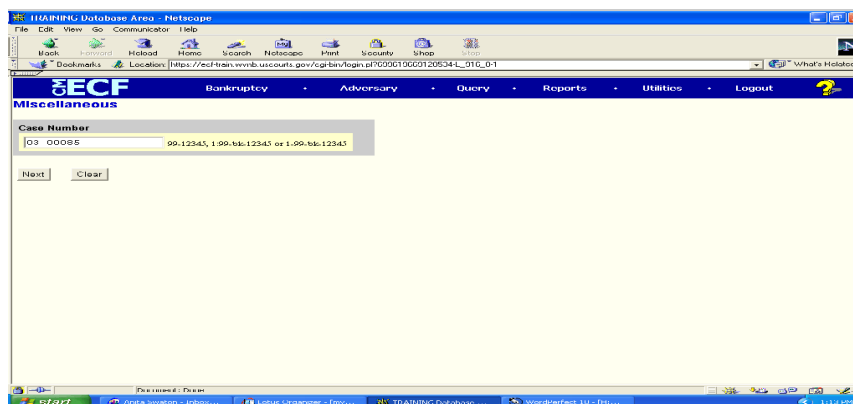


Figure 3

**STEP 4** The **Miscellaneous** screen appears. (See Figure 4.)

- ◆ Click on **Reaffirmation Agreement**.
- ◆ Click **[Next]** to continue.

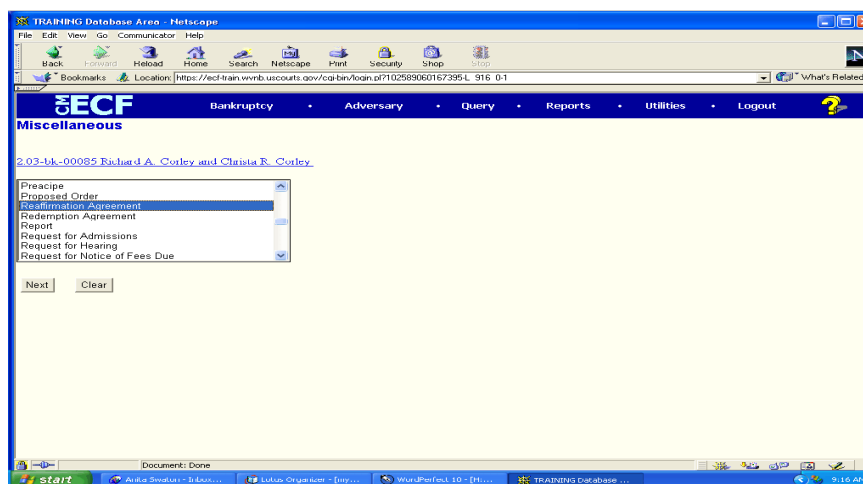
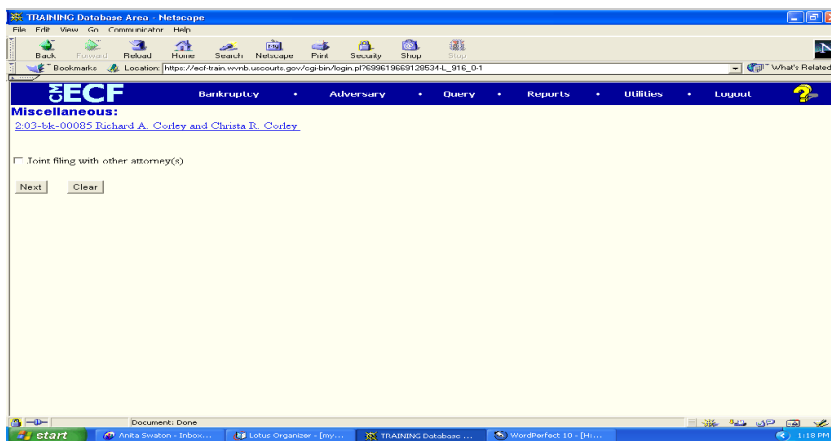


Figure 4

**STEP 5** The **Joint Filing** screen appears. (See Figure 5.)

- ◆ If you are filing this pleading jointly with another attorney, click in the check box to indicate that. This will enable you to select the other attorney(s) later in this event.
- ◆ If this is **not** a joint filing, no further action is necessary.
- ◆ Click **[Next]** to continue.

**Figure 5****STEP 6** The **SELECT PARTY** screen appears and displays all of the parties currently in the case. (See Figure 6.)

- ◆ Select the party filers. In this case you will select the debtor(s).
- ◆ Click **[Next]** to continue.

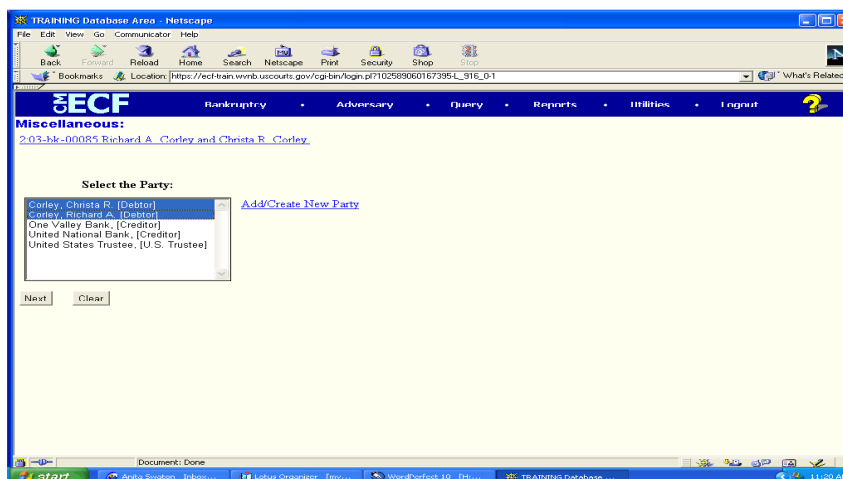


Figure 6

**STEP 7**

The **PDF DOCUMENT** screen displays. (See Figure 7.)

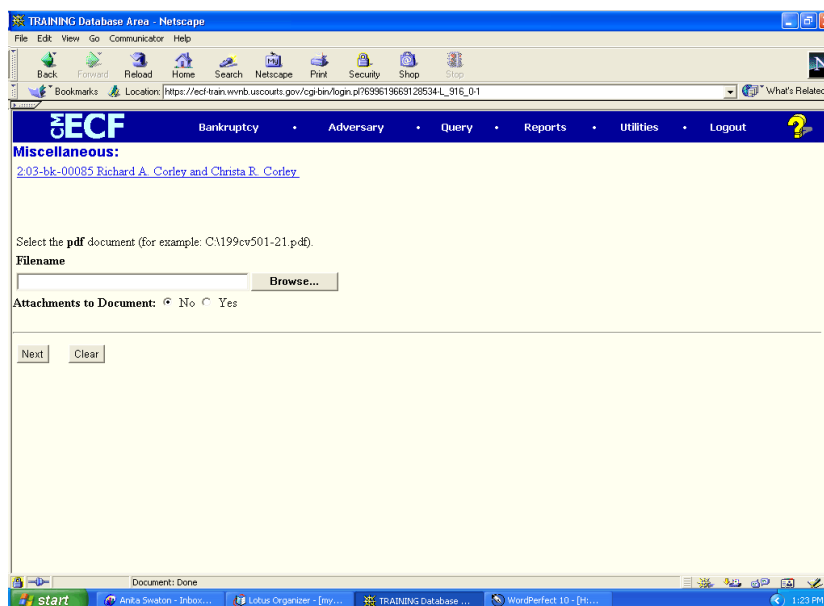
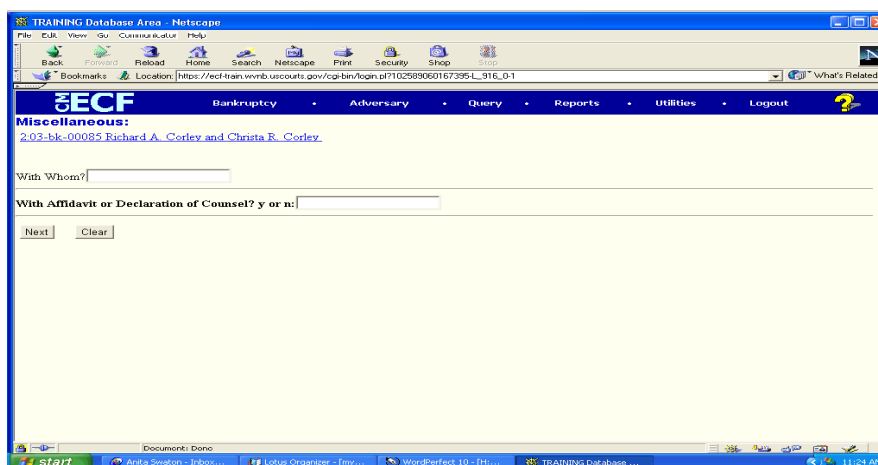


Figure 7

- ◆ To associate the imaged document with this entry:
  - Click **[Browse]**. In the **File Upload** window change **Files of type:** to **All Files (\*.\*)** Navigate to the directory where the appropriate PDF file is located and select it with your mouse.

- To make certain you are about to associate the correct PDF file for this entry, right click on the filename with your mouse and select **Open**.
- This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct.
- Close or minimize the Adobe application and if that is the correct file, click Open on the File Upload dialogue box.
- The system will enter the path and name of the PDF document selected into the Filename field.
- Click **[Next]** to continue.

**STEP 8** The following screen displays. (See Figure 8.)



**Figure 8**

- ◆ Insert after *With Whom?* the party with whom the debtor(s) are reaffirming.
- ◆ Insert **y** or **n** after *With Affidavit or Declaration of Counsel?*
- ◆ Click **[Next]** to continue.

**STEP 9** The **MODIFY DOCKET TEXT** screen displays. (See Figure 9.)

- ◆ Docket text may be added in the white box.

- ◆ Click **[Next]** to continue.

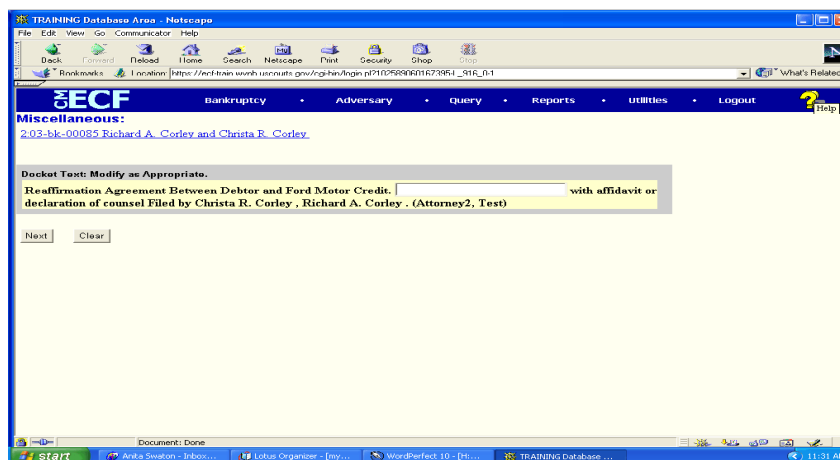


Figure 9

**STEP 10** The **FINAL DOCKET TEXT** screen displays. (See Figure 10.)

- ◆ Verify the accuracy of the docket text. This is what will print on the docket sheet. If the docket text has an error, click the browser's **[Back]** button at the top of the screen one or more times to access the screen on which the error was made, and correct the error.
- ◆ To abort or restart the transaction, click on the Bankruptcy hyperlink on the **CM/ECF Main Menu Bar**. Although this can be done at any time, this is your last opportunity to change the event.
- ◆ When the docket text is correct, click **[Next]** to continue.

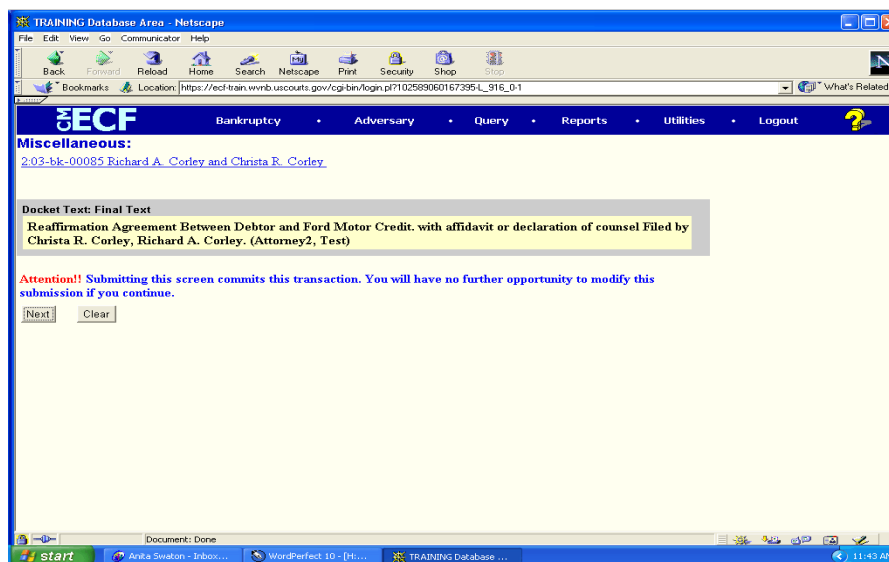


Figure 10

- STEP 11** The **NOTICE OF ELECTRONIC FILING** screen displays. (See Figure 11.)
- ◆ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that this is now an official court document.
  - ◆ Clicking on the case number hyperlink will display the PACER login screen. After logging into PACER, the docket report screen will appear.
  - ◆ Clicking on the document number hyperlink will display the PACER login screen. After logging into PACER, the PDF document will appear.
  - ◆ To print a copy of this notice, click the browser **[Print]** icon or button.
  - ◆ To save a copy of this receipt, click **File** on the browser menu bar and select **Save Frame As**.

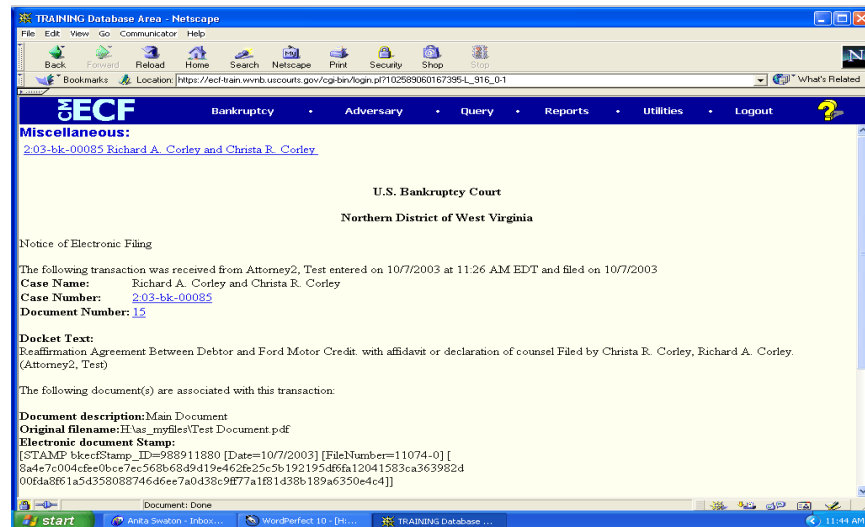


Figure 11

## Adversary Case Opening

Opening an Adversary proceeding involves entering the necessary information regarding the plaintiff, defendant, and basic statistical data. The complaint is incorporated into this process and will not need to be docketed separately. During the filing of this event (unlike the opening of a Bankruptcy Case), the attorney for the plaintiff must select himself/herself at the attorney selection screen.

- STEP 1** Click the Adversary hyperlink on the CM/ECF main menu bar. (See Figure 1.)

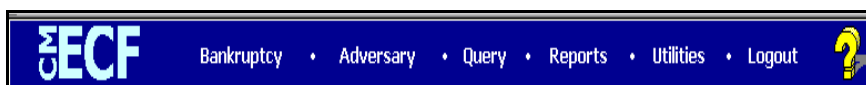


Figure 1

- STEP 2** Click on the Open AP Case hyperlink displayed on the **ADVERSARY EVENTS** screen. (See Figure 2.)

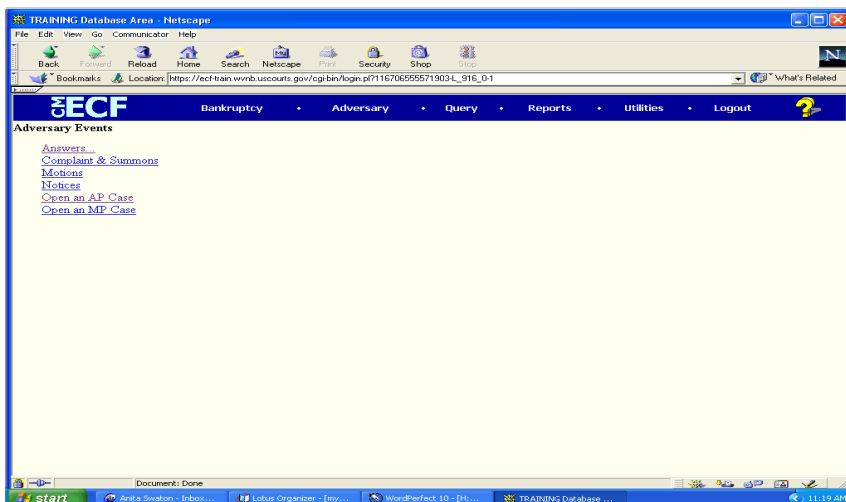


Figure 2

**STEP 3** The **CASE DATA** screen displays. (See Figure 3.)**Figure 3**

- ◆ The case number will be generated at the end of this process. Make sure you take note of it on the final screen.
- ◆ From the drop-down menu for **Office** location, select the correct Office based upon the county in which the debtor resides. The bankruptcy case also reflects this Office location. Select Clarksburg for 1, Elkins for 2, Martinsburg for 3 and Wheeling for 5.
- ◆ The **Case Type** value is **ap** for adversary proceeding. There is no other selection
- ◆ The current date is displayed next to **Date Filed**.
- ◆ The Complaint field signifies the lead event for this proceeding. If you are filing something other than a complaint such as a Notice of Removal, select **(n)** for no.
- ◆ Click **[Next]**.

**STEP 4** The **PARTY SEARCH** screen appears. (See Figure 4.)

- ◆ Before adding a party, it is recommended that one search the database for the party. One can search by Social Security Number, Tax Identification Number, Last Name or Business Name. It is recommended that you add parties to the case in the following order: plaintiffs, defendants, then interested parties as applicable.
  - Enter the last name of the party to be searched. If this is a business filing, enter the first word of the name to search the database. The entire business name is stored in the **Last/Business name** field. The field size is 200 characters

**Search Hints:**

- Enter one field of data for each search.
- Format Social Security Number or Tax ID with hyphens.
- Include punctuation. (O'Brien, Zeta-Jones)
- Try alternate search clues if your first search is not successful.
- Partial names (minimum of two characters) can be entered.
- Wild cards (\*) are not required at the end of search strings.
- Wild cards may be used before or within search strings. (\*son, Gr?y)
- Do not search only by the asterisk \* itself.

- ◆ Enter the plaintiff's last/business name and click **[Search]**.

**NOTE:** Do not use the asterisk \* by itself as search criteria. If just the asterisk is used, the entire database will be searched and require unnecessary systems resources and may degrade response time.

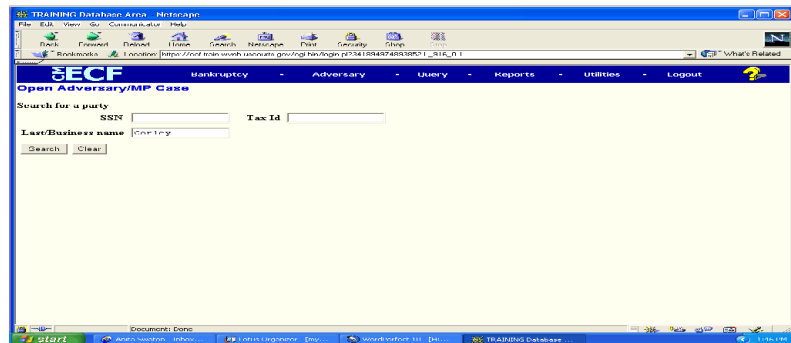


Figure 4

**STEP 5** The **SEARCH RESULTS** screen appears. (See Figure 5a.)

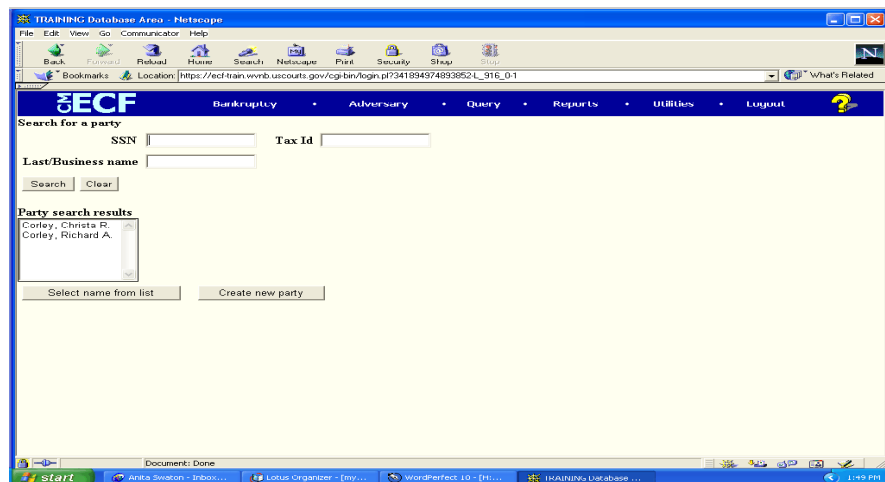


Figure 5a

**NOTE:** If the designated party was already on the database, the Party Search Results screen would provide a listing of parties matching your search criteria. In that situation you would select the party by highlighting the name with your mouse and click on the **[Select Name From List]** button. (See Figure 5b.) Then proceed to Step 6.

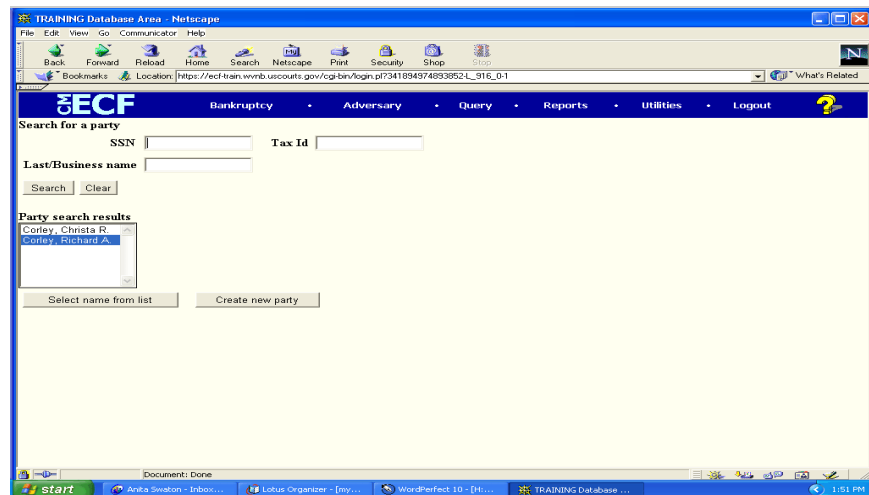


Figure 5b

OR

- ◆ If the system **does not** find the party with the search criteria entered, it will display a message **No person found.** (See Figure 5c.)

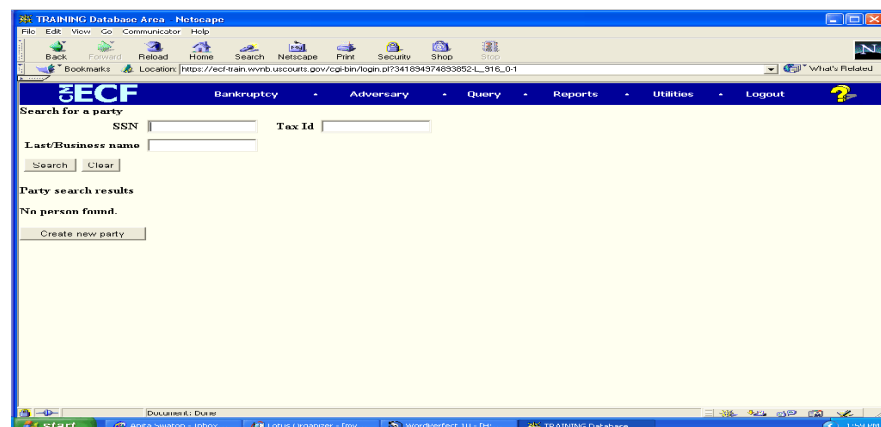


Figure 5c

- ◆ Click **Create New Party** to add party to the case.

## STEP 6 The **PARTY INFORMATION** screen appears. (See Figure 6.)

**Figure 6**

**NOTE:** If you have selected a party from the party list, you will not be able to change the social security number/tax id number field; however, you will be able to modify other field information.

- ◆ Enter or verify the plaintiff's **Name** and **Tax ID** or **SSN** information.
- ◆ Enter or verify/modify address and county information.
- ◆ ProSe should remain at the default **no**.
- ◆ Expand the **Role Type** selection pick list by clicking on the down arrow ▼ and select Plaintiff.
- ◆ The **Party Text** field is used for further party description, such as A California Corporation or Executor for the Estate of.... This information will appear on the caption of the docket report immediately after the party's name.
- ◆ Click on the **[Attorney]** button on the **PARTY INFORMATION** screen. (See Figure 6.)

- STEP 7** For adversary openings **ONLY**, you will need to add yourself as the attorney representing the plaintiff(s).
- ◆ Your attorney record already exists on the court's database in an attorney roll that is maintained by court staff.
- The **ATTORNEY SEARCH** screen allows you to retrieve your attorney record by Last Name (or partial Last Name.) (See Figure 7.)
- ◆ Enter your last name
  - ◆ Click on **[Search]**.

- STEP 8** The **ATTORNEY SEARCH RESULTS** screen will display all the matches for the search clue you entered. (See Figure 8.)

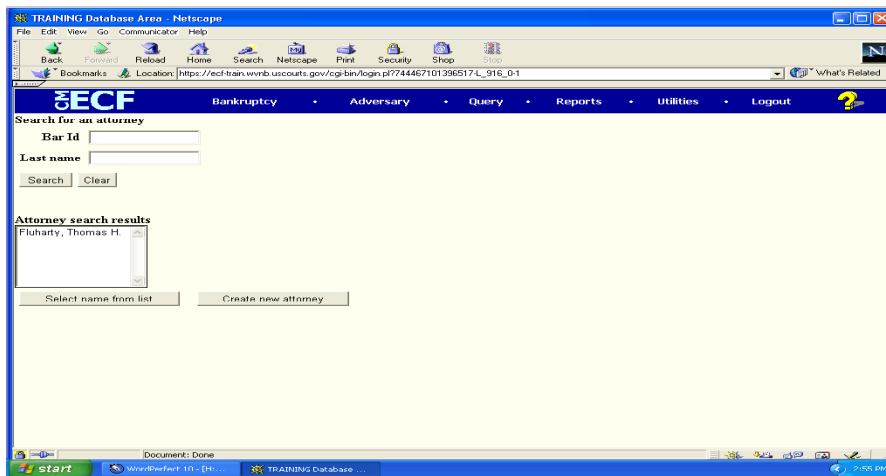


Figure 8

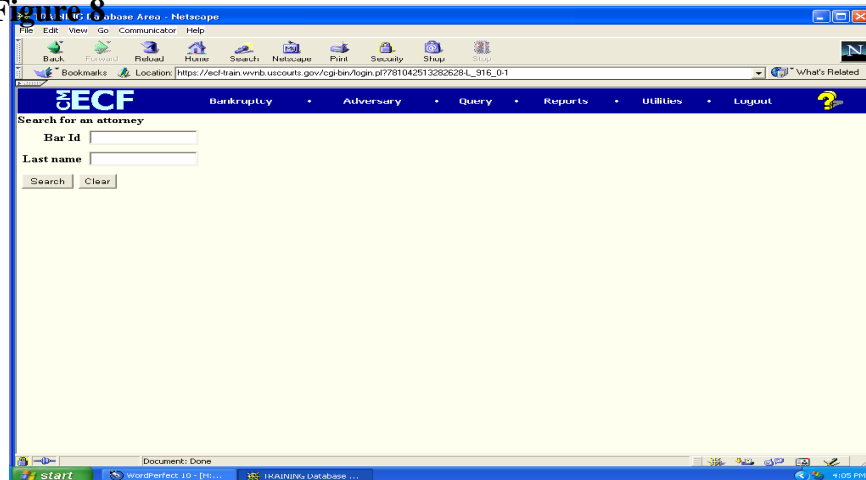


Figure 7

- ◆ Click to highlight the attorney name
- ◆ Click **[Select name from list]** to continue and add yourself as the attorney for the party

**NOTE:** If you are representing multiple parties, you will need to add yourself as the attorney for each plaintiff-party you are representing.

**STEP 9** The **ATTORNEY INFORMATION** screen displays the master attorney record from the court attorney roll. (See Figure 9.)

The screenshot shows a Netscape browser window titled "TRAINING Database Area - Netscape". The address bar displays the URL: [https://ecf-train.wvrb.uscourts.gov/cgi-bin/login.pl?74446710139517-L\\_816\\_01](https://ecf-train.wvrb.uscourts.gov/cgi-bin/login.pl?74446710139517-L_816_01). The page content is titled "Attorney Information (Party Corley, Richard A.)" and "Thomas H. Fluharty Bar Id:Unknown Bar Status:Unknown". The form contains the following fields:

Office	<input type="text"/>	Address 1	<input type="text" value="408 Lee Avenue"/>
Address 2	<input type="text"/>	Address 3	<input type="text"/>
City	<input type="text" value="Clarksburg"/>	State	<input type="text" value="WV"/>
Zip	<input type="text" value="26301"/>	Country	<input type="text"/>
Phone	<input type="text" value="304-624-7832"/>	Fax	<input type="text"/>
E-mail	<input type="text"/>	Lead attorney	<input type="text" value="yes"/>

At the bottom of the form are three buttons: "Add attorney", "Cancel attorney", and "Clear". A note below the buttons states: "Click the Add attorney or Cancel attorney button to return to the Party screen and add other attorneys, add aliases, or submit all information for this party."

Figure 9

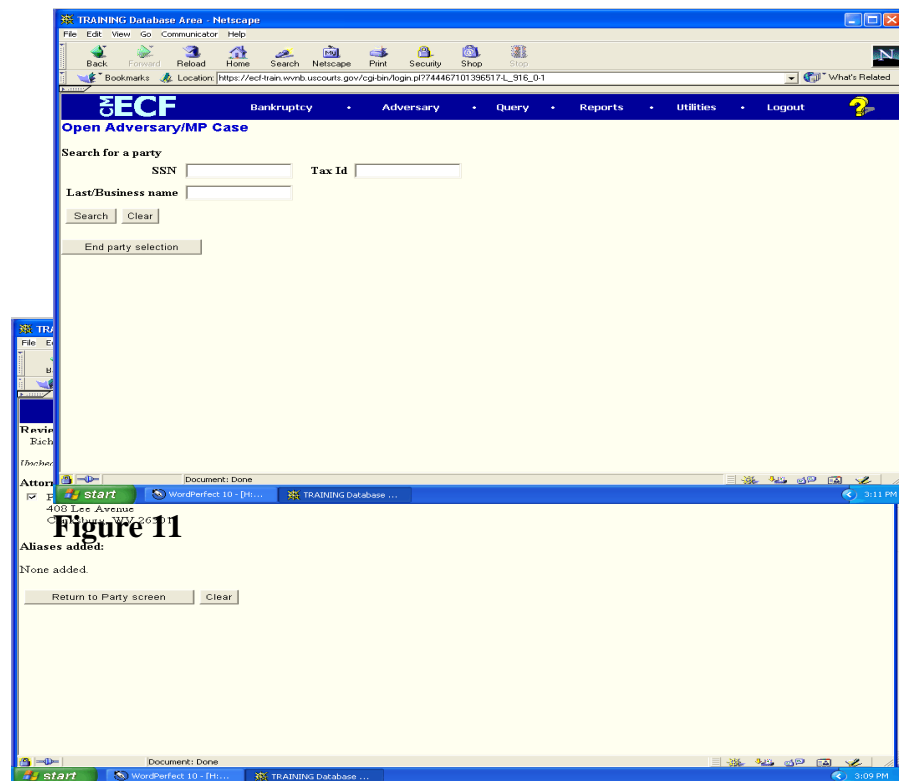
- ◆ Your attorney record can accommodate only one address. If the address for this case is different, make the changes to this screen. This will change professional and mailing information **FOR THIS CASE ONLY**.
- ◆ After verifying this information, click **[Add Attorney]** to associate this record with your plaintiff.
- ◆ The main **PARTY INFORMATION** screen again appears. (See **Figure 10a.**) At this time you could click on the **[Review]** button to verify attorney and alias information for this party. Figure 10b shows how this information is displayed.

The screenshot shows a Netscape browser window titled "TRAINING Database Area - Netscape". The address bar displays "https://ecf-train.wvnb.uscourts.gov/cgi-bin/login.pl?7444671013965174\_916\_01". The page features a blue header with the ECF logo and navigation links: Bankruptcy, Adversary, Query, Reports, Utilities, and Logout. The main content area is titled "Party Information" and shows details for "Richard A. Corley" with "SSN: Unknown". The form includes fields for Office, Address 1 (12 Indian Estates), Address 2, Address 3, City (Wheeling), State (WV), Zip (26003), County (Ohio), Country, Phone, Fax, E-mail, ProSe (no), and Role (Plaintiff (pla.pty)). A "Party text" field is also present. At the bottom, there are buttons for "Attorney...", "Alias...", "Review...", "Submit", "Cancel", and "Clear". A note states: "Add all attorneys and aliases before clicking the Submit button."

Figure 10a

- ◆ Click on **[Return to Party screen]**.
- ◆ When the Party Information screen appears again, click **[Submit]**

**STEP 10** The **PARTY SEARCH** screen will appear again Repeat Steps 4-9 until all Plaintiff(s), Defendant(s), or other interested parties have been added to the system. (See Figure 11.)



**Figure 10b**

- ◆ When adding a defendant, do **not** associate an attorney for the defendant. The attorney for a defendant will be added to the case upon the filing of an answer.

- ◆ Select the appropriate **party role** for each party you are adding.
- ◆ When all parties have been entered, click on **[End Party Selection]**.

**STEP 11** The **ADVERSARY STATISTICAL** screen appears.  
(See Figure 12a).

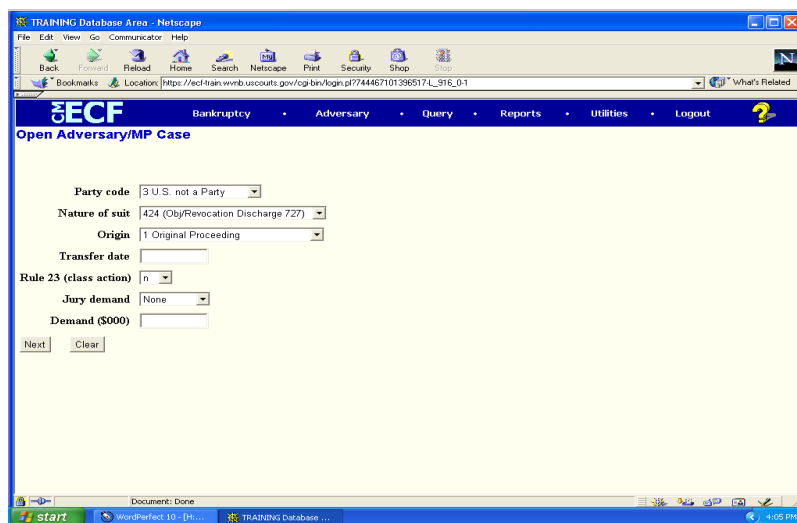


Figure 12a

- ◆ Unless the US is a plaintiff or defendant in your case, accept the default **US not a Party** as shown in Figure 12b.

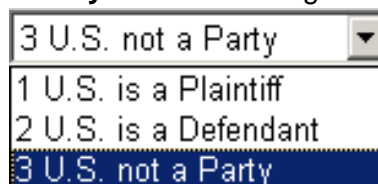


Figure 12b

- ◆ Click the down arrow to reveal the list of **Nature of Suit** options. Click to highlight the nature of suit that applies to the instant case. Only one **Nature of Suit** option can be selected. (See Figure 12c.)

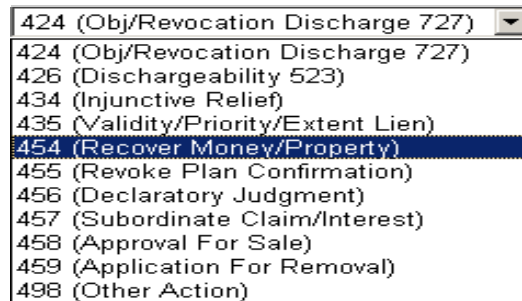


Figure 12c

**NOTE:** If there are multiple suites and one is a 727 Objection to Discharge, it is important to enter 424 as the Nature of Suite here.

- ◆ The **Origin** code defaults to original proceeding. (See Figure 12d.) Accept the default. Other values are:

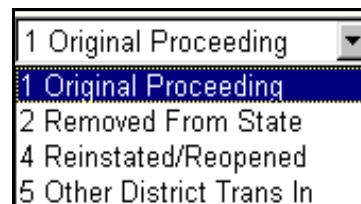


Figure 12d

- ◆ Enter a **Transfer Date** if applicable.
- ◆ Click the down arrow to reveal the list of **Rule 23 (Class Action)** options. The default is **n** for no. Change the default to **y** only if this is a Class Action suit.
- ◆ Click the down arrow to reveal the list of **Jury Demand** options. Those options are *Both*, *Defendant*, *None*, or *Plaintiff*. The default in the **Jury Demand** box is *n* (None). If you are requesting a jury trial in your attached complaint, so indicate in this field. (See Figure 12e.)



Figure 12e

- ◆ **Demand:** If there is a dollar demand in the complaint, enter the amount in thousands to the nearest thousand. For example, if the Dollar Demand is \$4550, \$5,000, or \$5499, you would enter 5 for \$5000, leaving off the 000. Do not use dollar signs or commas.
- ◆ Verify the data on your screen and then click **[Next]**.

**STEP 12** The **Add Associated Cases** screen appears. (See Figure 13a.)

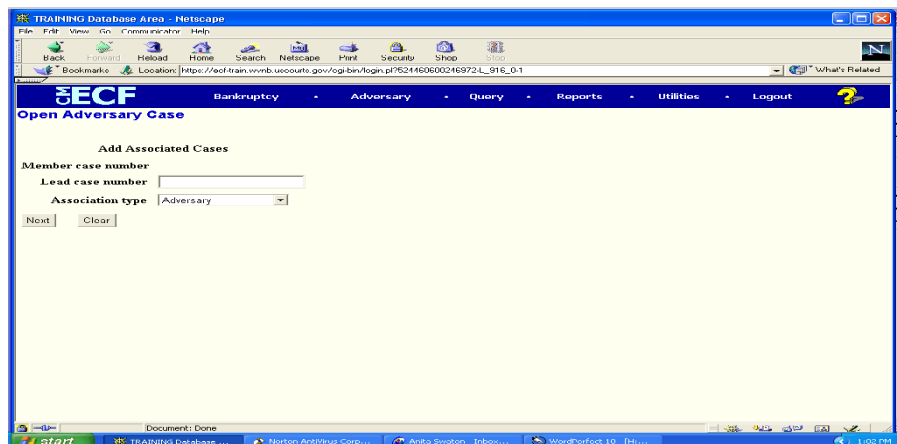


Figure 13a

- ◆ Enter the **Lead Bankruptcy Case Number** in yy-nnnnn format, including the hyphen.

**NOTE:** If the case number is invalid or if the lead case does not

reside on this database, an error message, “YY-NNNNN is not a valid case. Please enter a valid value.” is generated. You will not be able to proceed with the case opening process. Research the reason for the error.

If you **do not** enter any number in the **Lead Case Number** field, the system **will** allow you to proceed with case opening.

- ◆ The **Association type** defaults to Adversary. Other selections are Consolidated, Jointly Administered, and Related. Leave the default.
- ◆ Click **[Next]** to continue. (See Figure 13b.)

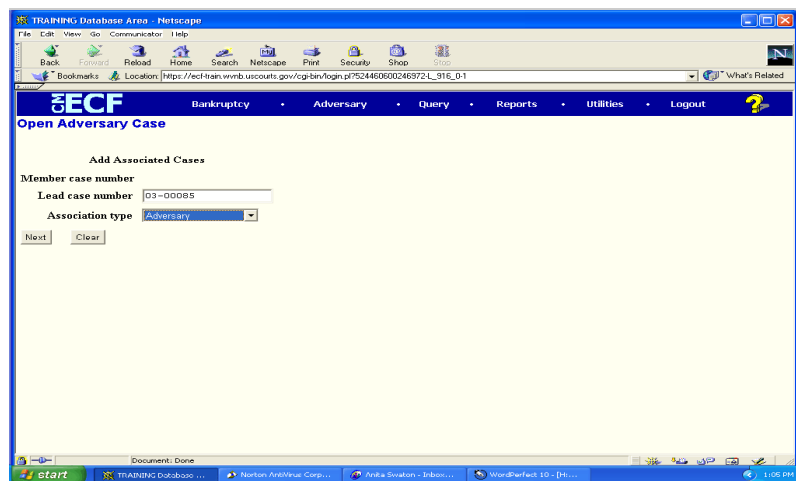


Figure 13b

**STEP 13** The **PDF DOCUMENT SELECTION** screen displays. (See Figure 14a.)

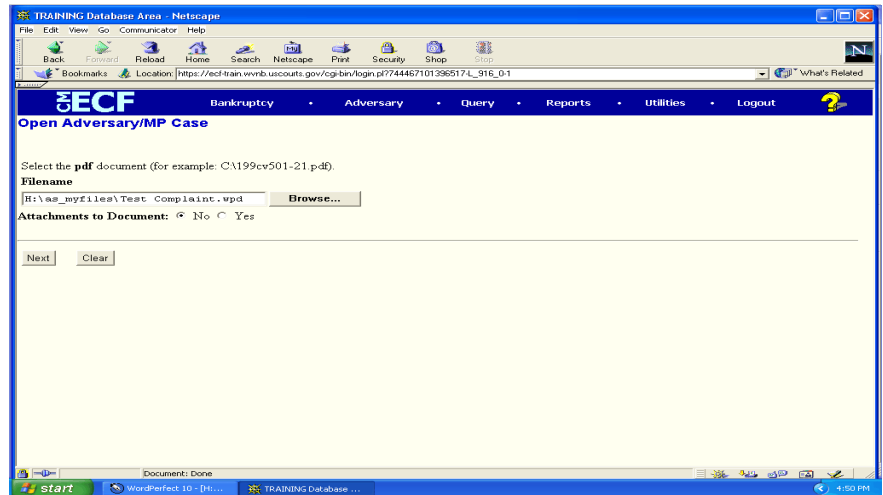


Figure 14a

- ◆ To associate the imaged document with this entry, select the PDF filename of the complaint you are filing.
  - Click **[Browse]**. In the **File Upload** screen change **Files of type:** to **All files(\*.\*)** then navigate to the directory where the appropriate PDF file is located and select it with your mouse.
  - To make certain you are about to associate the correct PDF file for this entry, right click on the filename with your mouse and select **Open**.
  - This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct.
  - Close or minimize the Adobe application and if that is the correct file, click **[Open]** on the File Upload dialogue box.
- ◆ The **PDF DOCUMENT SELECTION** screen appears with the path and PDF document in the **Filename** box. (See Figure 14a.)
- ◆ The **Attachments to Document** option defaults to **No**. If you have attachments to this document, click the **Yes** radio button to indicate there are attachments. (Refer to module: *Attachments to Documents* for more information.)

- ◆ Click **[Next]** to continue.

**STEP 14** The **FILING FEE** screen will display prompts for fee and receipt information. (See Figure 15.)

TRAINING Database Area - Netscape  
File Edit View Go Communication Help  
Back Forward Reload Home Search Netscape Print Security Shop  
Bookmarks Location: https://ecf-train.wvmb.uscourts.gov/cgi-bin/frm.pl?744467101380517L\_916\_0-1 What's Related  
ECF Bankruptcy Adversary Query Reports Utilities Logout  
Open Adversary/MP Case  
COURT USERS ONLY: If this is a 727 Objection to Discharge, Set 727OBJ Flag Next.  
Please Enter: A Receipt Number or CC for Credit Card or O for Other Payment.  
Receipt #: Fee: \$150  
Next Clear

**Figure 15**

**NOTE:** You may see a displayed message such as the one in figure 15 for **COURT USERS ONLY**: Disregard this message.

- ◆ You will not know what the **Receipt #** is. Enter **CC** in the **Receipt #** field to indicate payment by Credit Card. If no fee is required, enter **N/A**.
- ◆ The Fee Amount defaults to the amount of the complaint filing fee, \$150.00.
- ◆ Click **[Next]** to continue.

**STEP 15** The **Docket Text: Modify as Appropriate** screen displays. (See Figure 16.)

- ◆ Click the down arrow to display the prefix options. Select a descriptive prefix, if it is appropriate.
- ◆ If necessary, add detail to the final text.
- ◆ Click **[Next]**.

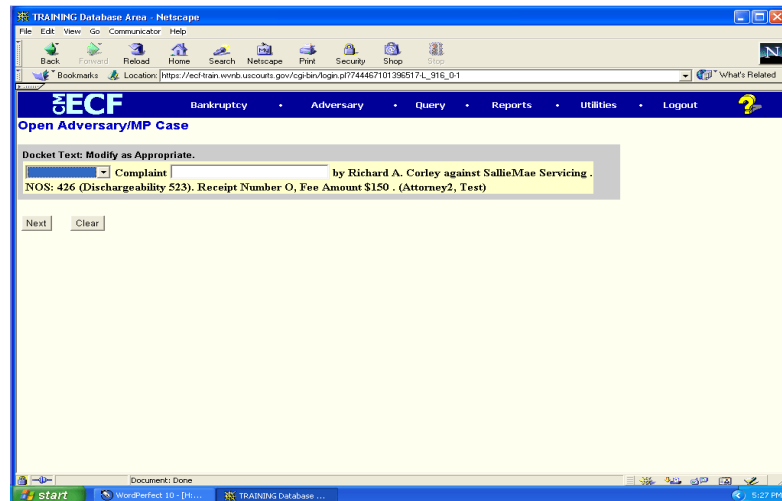


Figure 16

**STEP 16** The **FINAL DOCKET TEXT** screen displays.

- ◆ Proof this screen carefully! No further editing in the case opening process is allowed after this screen. If Docket Text is correct, click **[Next]**.
- ◆ If any part of it is incorrect, click the browser **[Back]** button to return to the screen you need to correct. Then process the screens again with the respective **[Next]** or **[Submit]** buttons.

**NOTE:** When an adversary case is opened, the complaint information is spread over to the main bankruptcy case. (The case number does not appear in the docket text.)

**When the judgment is rendered, the ruling will also spread over to the main bankruptcy case.**

**NOTE:** To abort or restart the transaction at any time up until the final docket text screen, click the **Adversary** hyperlink on the **Menu Bar**.

**STEP 17** The **NOTICE OF ELECTRONIC FILING** screen appears.

- ◆ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that this is now an official court document. **(See Figure 17.)**
- ◆ The case number is a hyperlink to the docket sheet and the document number is a hyperlink to the PDF document image. **The case number of both this adversary and the lead bankruptcy case appear.** This indicates that this complaint entry has spread to the bankruptcy case and will be available to anyone reviewing the Bankruptcy Docket report. The hyperlink to the imaged PDF complaint is also accessible from the bankruptcy case.
- ◆ To print a copy of this notice, click the browser **[Print]** icon.
- ◆ To save a copy of this notice, click **[File]** on the browser menu bar and select **Save Frame As**.
- ◆ Further access to the **Notice of Electronic Filing** is available through the electronic docket report. When this option is selected, a bullet appears next to the document number of the event on the docket report. Clicking on this bullet will display a copy of this notice.
- ◆ When a copy of the **Notice of Electronic Filing** is mailed to each subscriber on the case, the following message will display at the top:

**\*\*\*NOTE TO PUBLIC ACCESS USERS\*\*\***

**You may view the filed documents once without charge. To avoid later charges, download a copy of each document during this first viewing.**

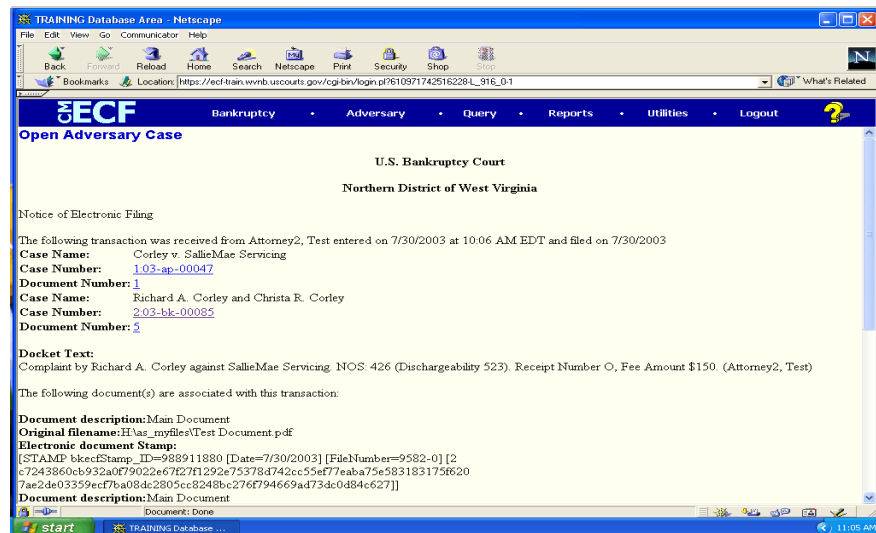


Figure 17

## Answer to Complaint

This process shows the steps and screens required for an attorney to electronically file the answer to a complaint in an adversary case.

- STEP 1** Click on the Adversary hyperlink on the CM/ECF Main Menu Bar. (See Figure 1.)

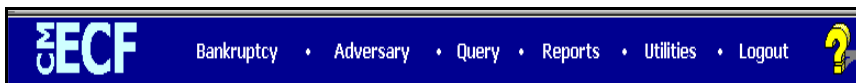


Figure 1

- STEP 2** The **ADVERSARY EVENTS** screen displays. (See Figure 2.)

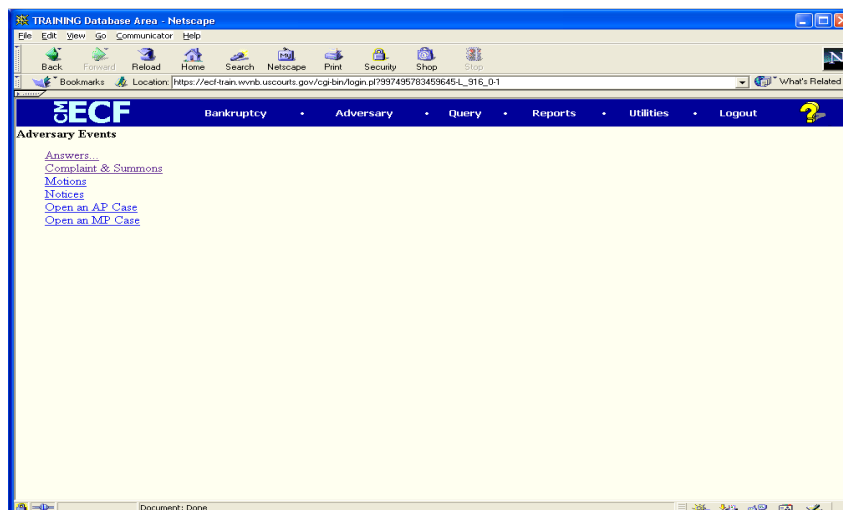
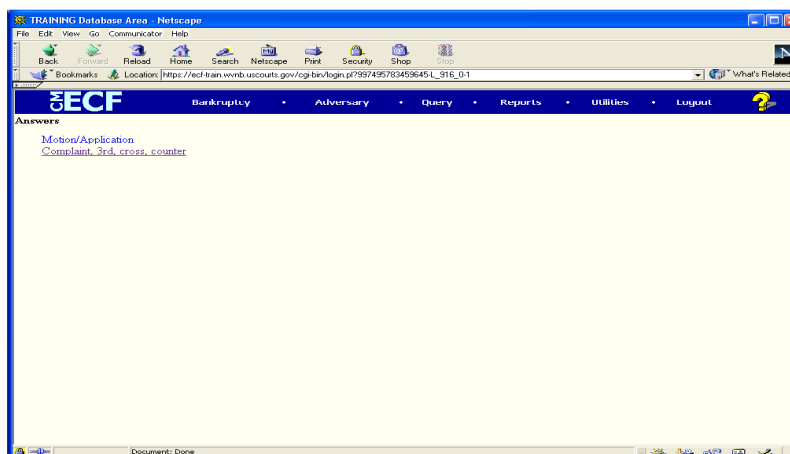


Figure 2

- ◆ Click on the Answers hyperlink.
- STEP 3** The next screen lists two menu selections for Answers. (See Figure 3.)

**Figure 3**

Motions/Applications, refers to documents filed in response to a motion or application, such as an objection, reply or response.

Complaint, 3rd, cross, counter refers to documents which are answers to a complaint, third-party complaint, cross-claim, or counterclaim.

- ◆ We are docketing the answer to the original complaint, so click on Complaint, 3rd, cross, counter.

**NOTE:** Third-party complaint, cross-claim, and counterclaims are covered later in Step 10.

**STEP 4** The **CASE NUMBER** screen displays (See Figure 4). The system will display the number of the last case you accessed in this session.

- ◆ If this is **not** the case in which you are filing an answer, delete this case number and enter the correct case number using yy-nnnnn format.
- ◆ Click [**Next**] to continue.

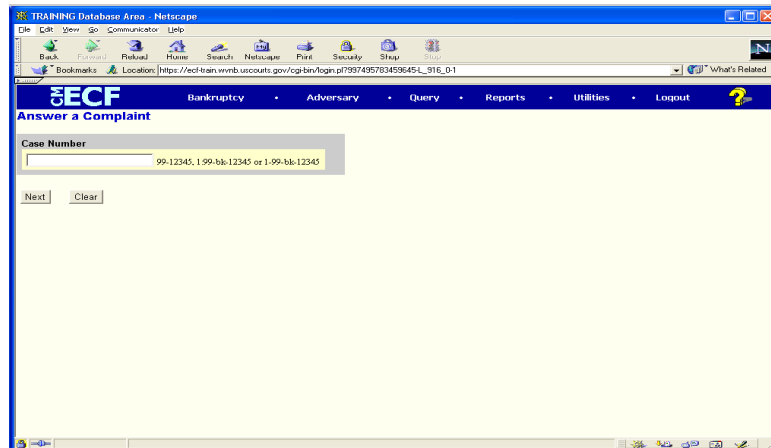


Figure 4

**STEP 5** This screen may appear if there is more than one case matching the number entered. (See Figure 5.)

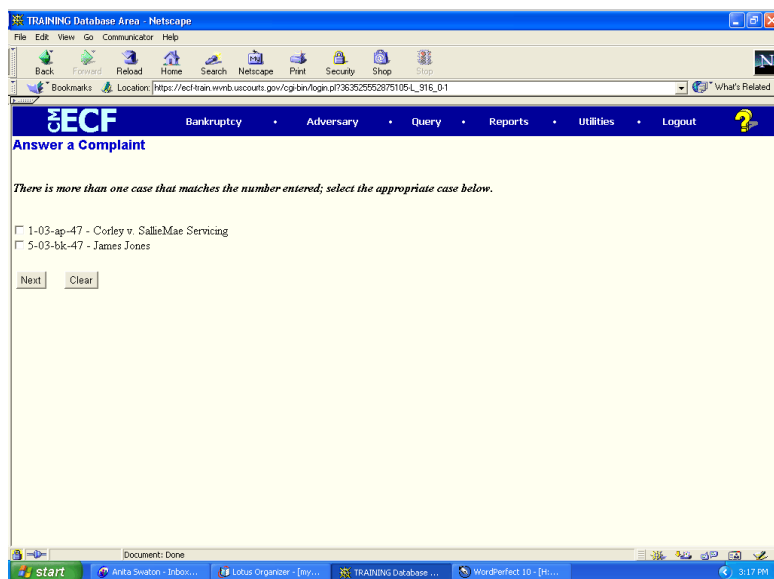
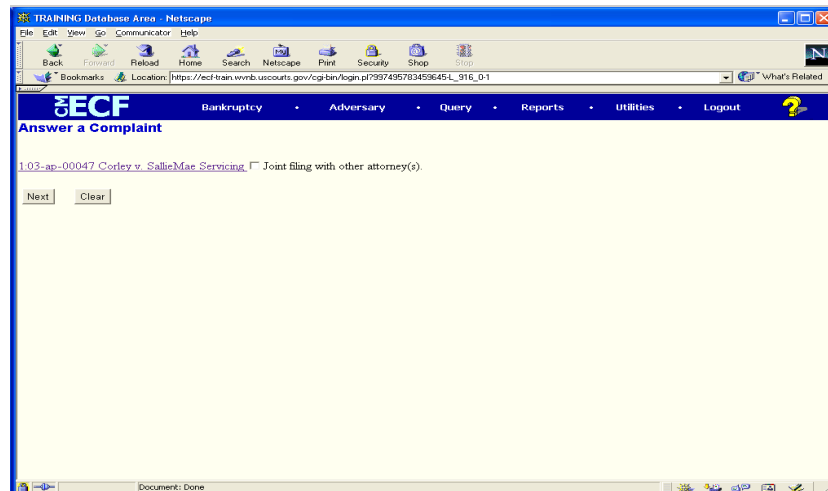


Figure 5

- ◆ Select the appropriate case.
- ◆ Click **[Next]** to continue.

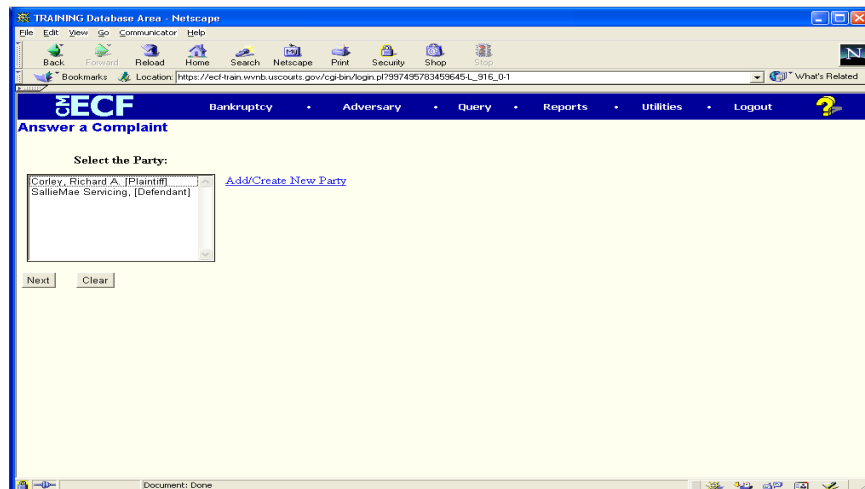
**STEP 6** The **Joint Filing** screen appears. (See Figure 6.)



**Figure 6**

- ◆ If you are filing this answer jointly with another attorney, click in the check box to indicate that. This will enable you to select the other attorney(s) later in this event.
- ◆ If this is **not** a joint filing, no further action is necessary.
- ◆ Click **[Next]** to continue.

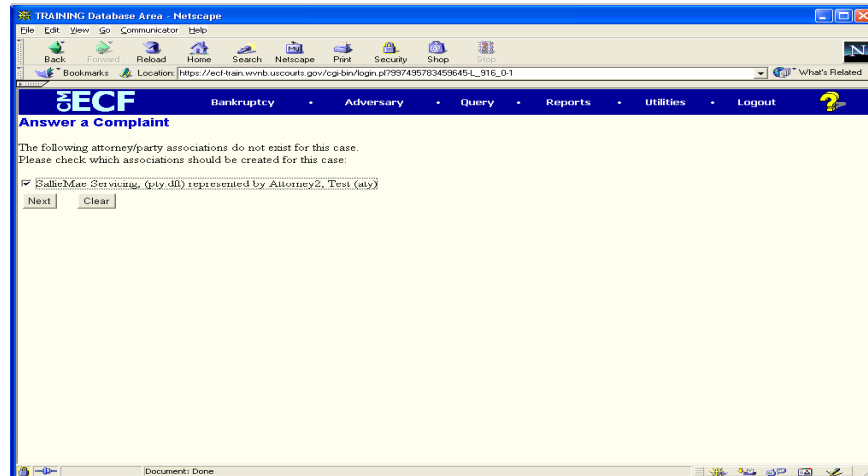
**STEP 7** The **SELECT PARTY** screen appears and displays all of the parties currently in the case. (See Figure 7.)

**Figure 7**

- ◆ Click on the defendant(s) for whom this answer is being filed, then click **[Next]**.

**STEP 8** The **PARTY/ATTORNEY ASSOCIATION** screen displays. (See Figure 8.)

- ◆ Although you have selected the party whom you are representing, the system doesn't automatically make that association. Therefore, you must click in the check box to create this link.
- ◆ Click **[Next]** to continue.

**Figure 8**

**STEP 9** The Complaint screen displays next. (See Figure 9.)

- ◆ This screen shows the complaint (and possibly other related events) in the case. It allows you to link the answer to the complaint. Click in the check box to link the appropriate complaint.
- ◆ Click **[Next]** to continue.

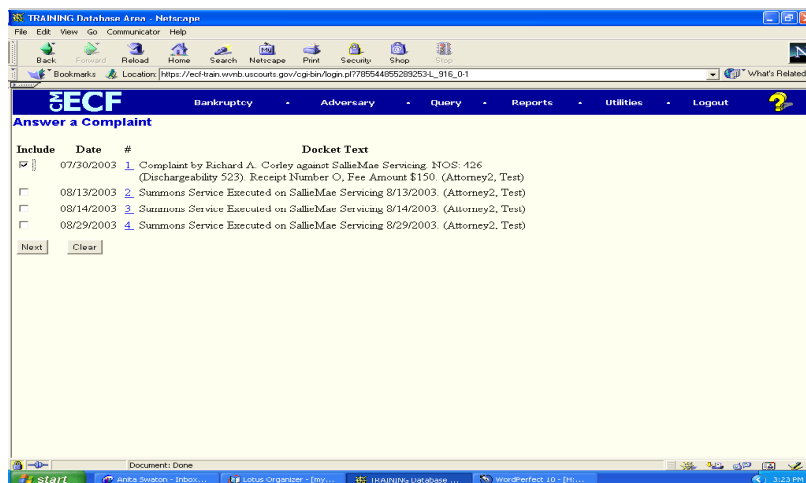


Figure 9

**STEP 10** The PDF DOCUMENT screen will then be presented.  
(See Figure 10a.)

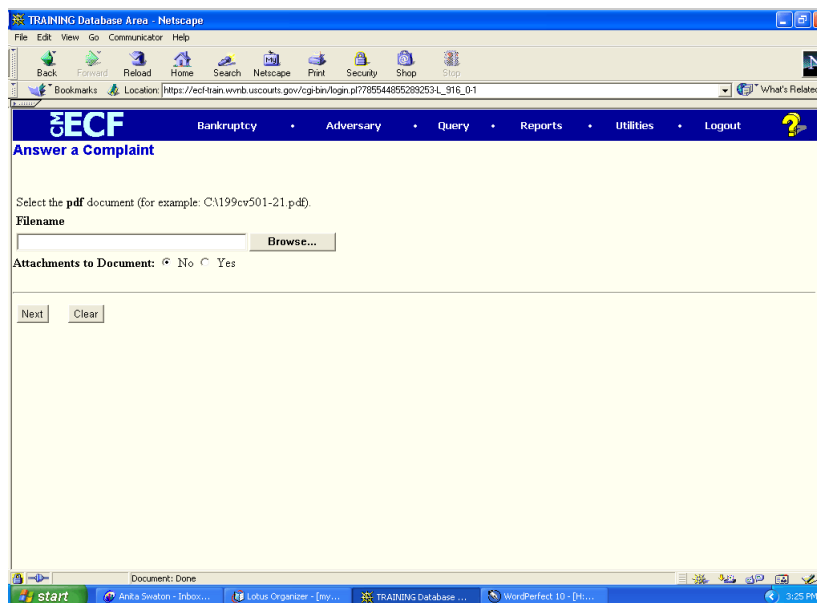
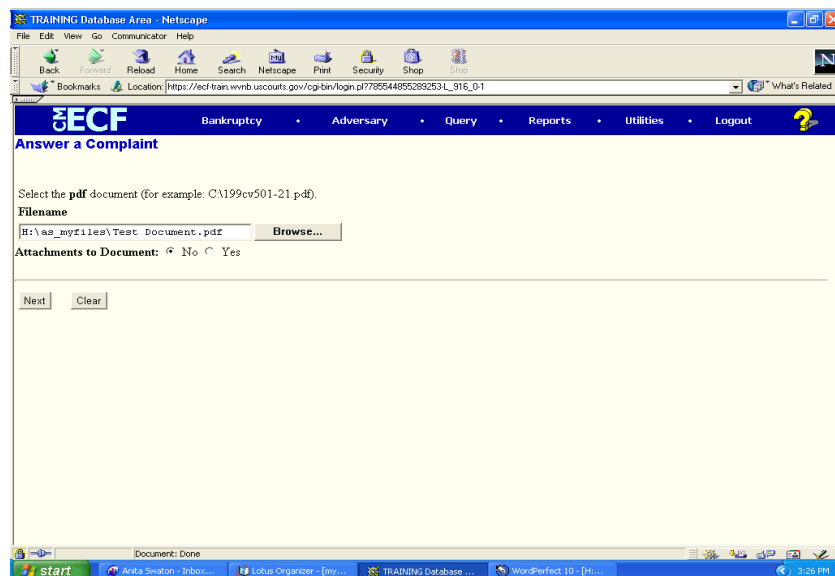


Figure 10a

◆ To associate the imaged document with this entry:

- Click **[Browse]**. In the **File Upload** window change **Files of type:** to **All Files (\*.\*)** Navigate to the directory where the appropriate PDF file is located and select it with your mouse.
- To make certain you are about to associate the correct PDF file for this entry, right click on the filename with your mouse and select **Open**.
- This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct.
- Close or minimize the Adobe application and if that is the correct file, click Open on the File Upload dialogue box.
- The system will enter the path and name of the PDF document selected into the Filename field. See **(Figure 10b.)**



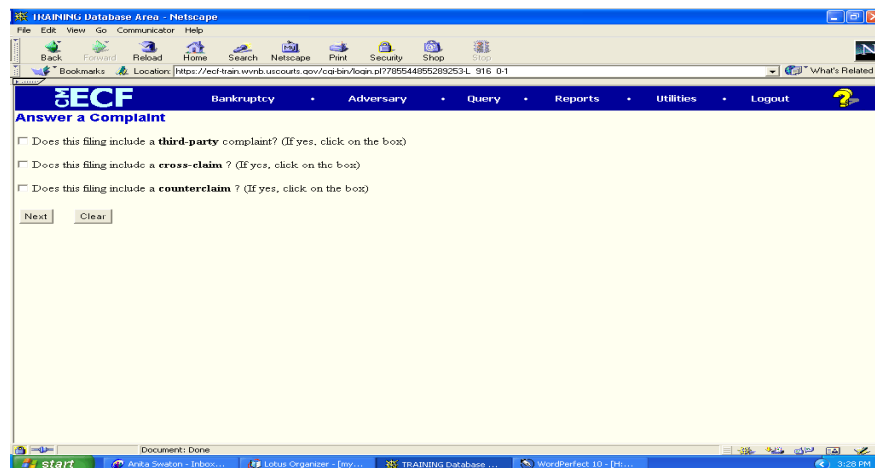
**Figure 10b**

- Click **[Next]**.

**STEP 11** The next screen provides secondary complaints to be addressed. (See Figure 11.) This screen provides the option of combining the answer with another claim.

- ◆ Indicate whether this answer includes a third-party complaint, a cross-claim, and/or a counterclaim by checking the appropriate box(es), then click **[Next]** to continue.
- ◆ If this answer contains no other claims, leave the check boxes unchecked and click **[Next]** to continue.

**NOTE:** If you check one of the check boxes, the system will lead you through entering the information regarding the new claimant.



**Figure 11**

**STEP 12** The **FINAL TEXT EDITING** screen displays. (See Figure 12.)

- ◆ Verify the accuracy of the docket text. This is what will print on the docket sheet. If the docket text has an error, click the browser's **[Back]** button at the top of the screen one or more times to access the screen on which the error was made, and correct the error.
- ◆ To abort or restart the transaction, click on the Adversary hyperlink on the **CM/ECF Main Menu Bar**. Although this can be done at any time, this is your last opportunity to change the event.

- ◆ If appropriate, select a prefix from the drop-down box and/or add text to the entry. Any text added here will appear in italics on the docket sheet.
- ◆ When the docket text is correct, click **[Next]** to continue.

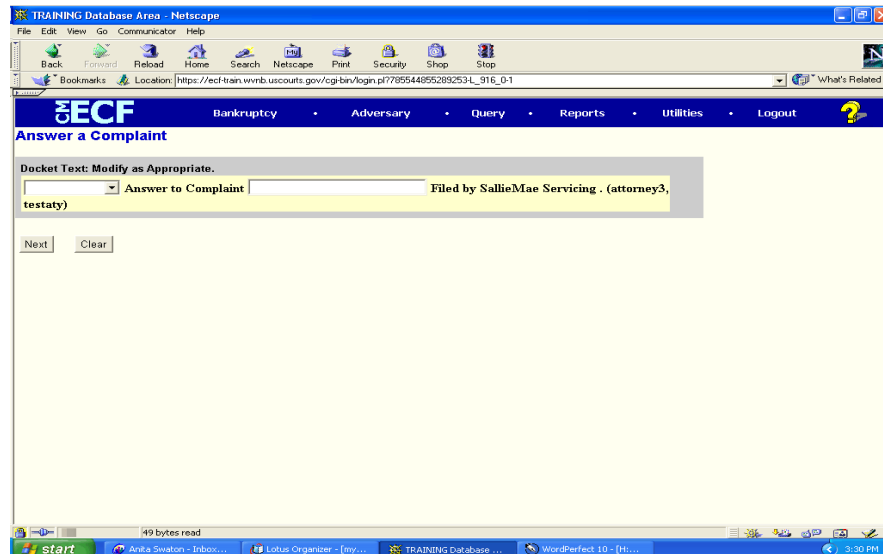


Figure 12

**STEP 13** The **FINAL DOCKET TEXT** screen displays. (See Figure 13.)

- ◆ Read the **Attention!!** message.
- ◆ If you are ready to submit this transaction click **[Next]**.

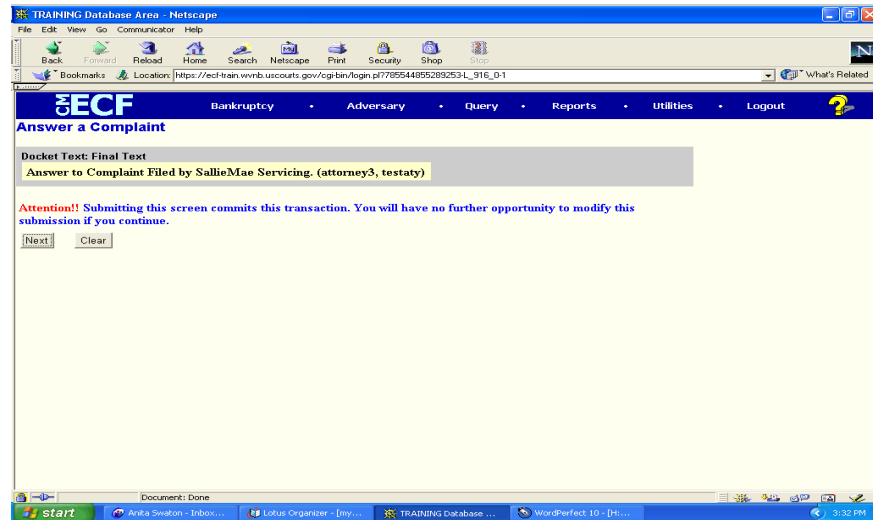


Figure 13

- STEP 14**      The **NOTICE OF ELECTRONIC FILING** screen displays.  
(See Figure 14.)
- ◆ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that the answer has been submitted by the defendant(s).
  - ◆ Clicking on the case number hyperlink, 1:02-ap-1004 (the case number may also appear as YY-NNNN as in 02-1004) will display the PACER login screen. After logging into PACER, the docket report screen will appear.
  - ◆ Clicking on the document number hyperlink will display the PACER login screen. After logging into PACER, the PDF document will appear.
  - ◆ To print a copy of this notice, click the browser **[Print]** icon or button.

- ◆ To save a copy of this receipt, click **File** on the browser menu bar

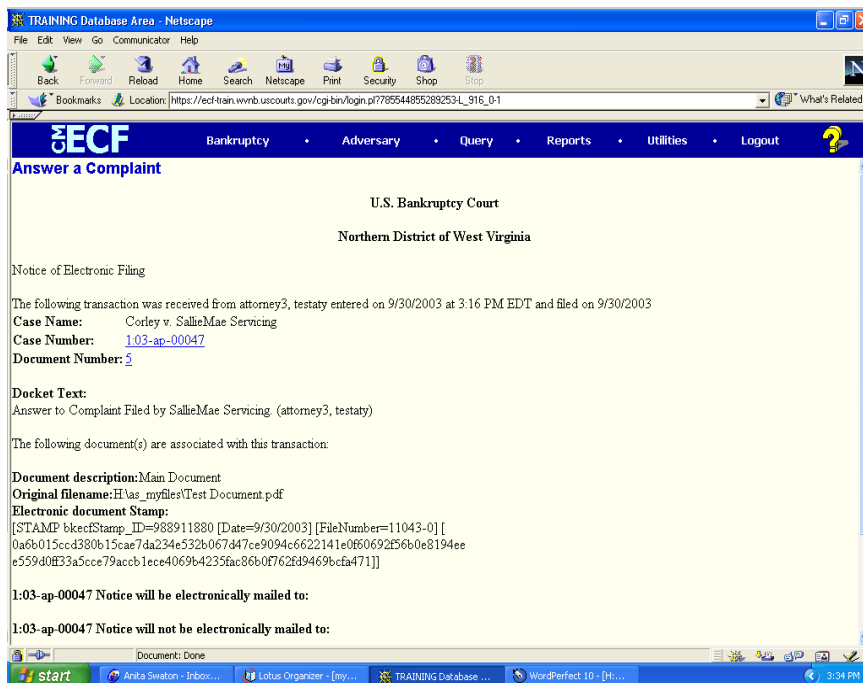


Figure 14

and select **Save Frame As**.

# SUMMONS SERVICE EXECUTED

This process shows the steps and screens required for an attorney to electronically file the summons evidencing service upon the defendant(s) in an adversary proceeding. Said summons was previously issued by the Bankruptcy Court and returned to you as counsel for the plaintiff(s) for service upon the defendant(s) along with the complaint.

**STEP 1** Click on the Adversary hyperlink on the CM/ECF Main Menu Bar. (See Figure 1.)



Figure 1

**STEP 2** The **ADVERSARY EVENTS** screen displays. (See Figure 2.)

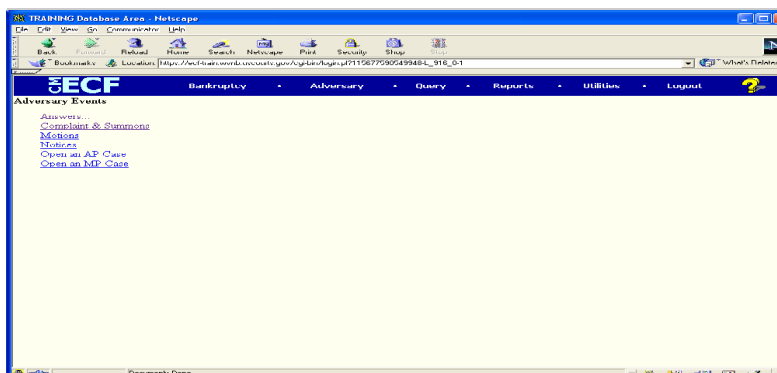
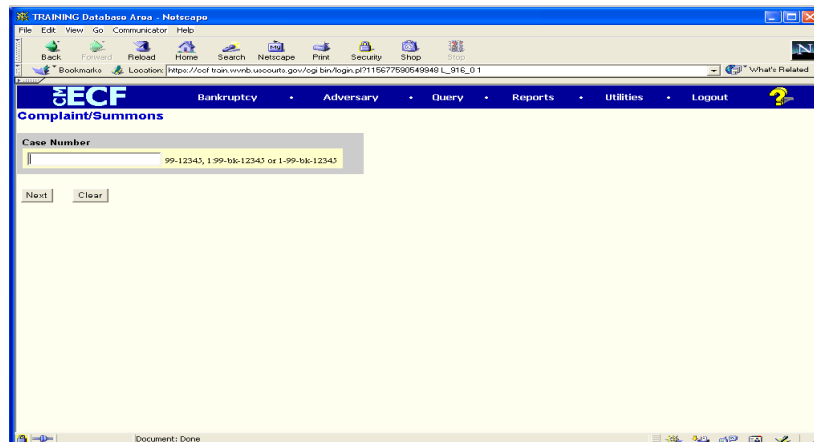


Figure 2

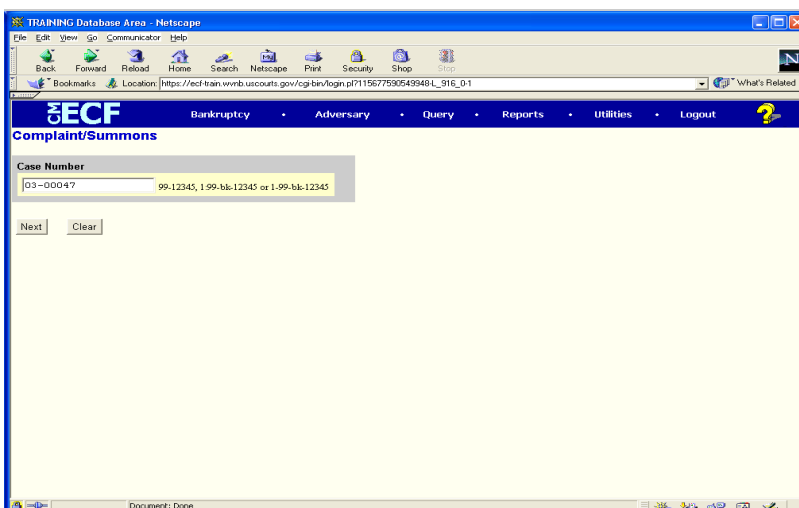
- ◆ Click the Complaint & Summons hyperlink.

**STEP 3** The **CASE NUMBER** screen displays. (See Figure 3a.)

A screenshot of a Netscape browser window titled "TRAINING Database Area - Netscape". The address bar shows a URL from the US Courts website. The page has a blue header with the ECF logo and navigation links: Bankruptcy, Adversary, Query, Reports, Utilities, and Logout. The main content area is titled "Complaint/Summons" and contains a "Case Number" label, a text input field with the value "99-12345, 199-bk-12345 or 1-99-bk-12345", and "Next" and "Clear" buttons.

**Figure 3a**

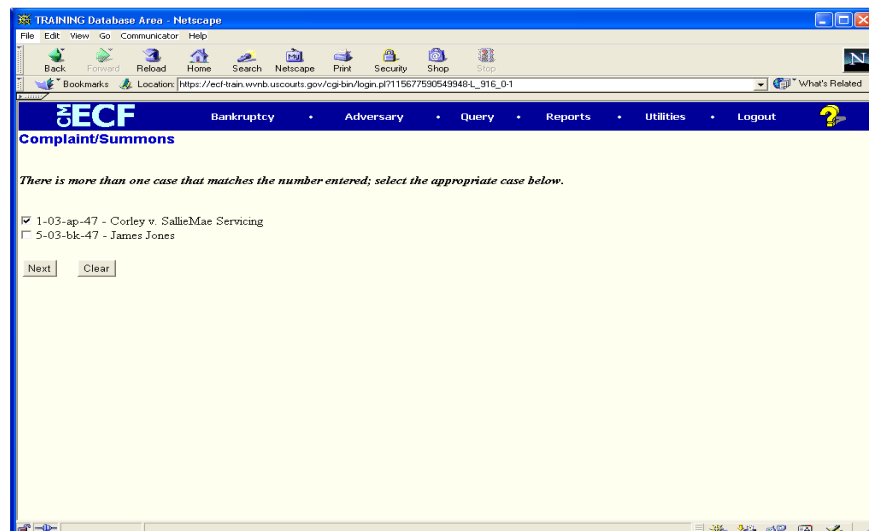
- ◆ Enter the case number. (See Figure 3b.)

A screenshot of the same Netscape browser window as Figure 3a. The "Case Number" input field now contains the text "03-00047". The "Next" and "Clear" buttons remain visible below the input field.

**Figure 3b**

- ◆ Click **[Next]** to continue.

- STEP 4** This screen may appear if there is more than one case that matches the number entered. **(See Figure 4.)**



**Figure 4**

- ◆ Select the appropriate case.
- ◆ Click **[Next]** to continue.

- STEP 5** The **DOCUMENT TYPE SELECTION** screen displays. (See Figure 5a.)

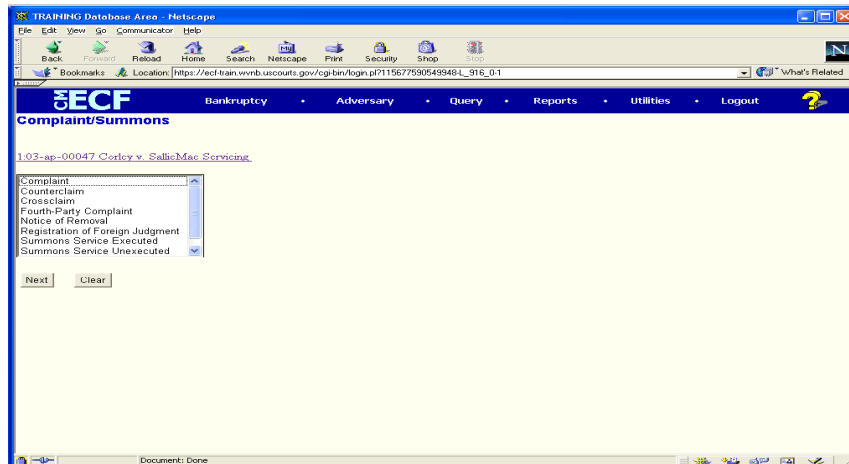


Figure 5a

- ◆ Verify case number and case name.
- ◆ Select Summons Service Executed. (See Figure 5b.)

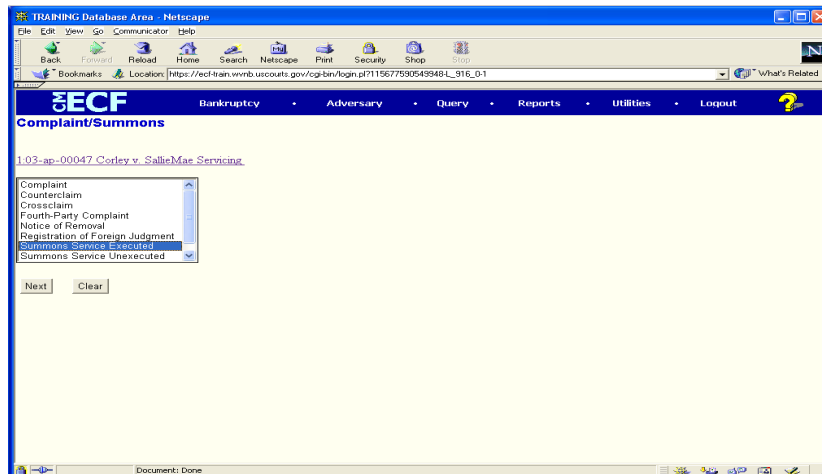


Figure 5b

- ◆ Click [Next] to continue.

**STEP 6** The pdf **SELECTION** screen displays. (See Figure 6a.)

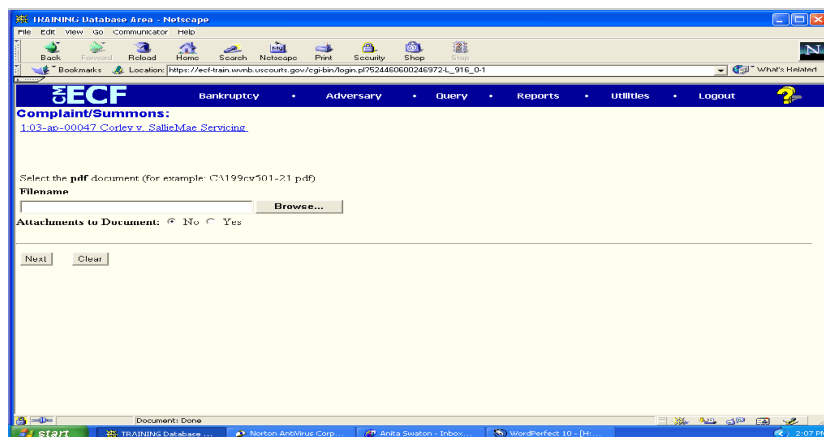


Figure 6a

- ◆ Click **[Browse]**, then navigate to the directory where the appropriate PDF file is located. Double-click the PDF file to select it.
- ◆ In the **File Upload** screen, change **Files of type:** to **All Files(\*.\*)**.

**NOTE:** If you wish to view the image before selecting to be sure you have chosen the correct file, before double-clicking, first right click on the highlighted filename and click on **open**. You

can

view the image in Adobe Acrobat, then close Adobe Acrobat

when

you have finished viewing the image.

- ◆ The **Attachments to Document** option defaults to **No**. If you have attachments to this document, click the **Yes** radio button to indicate there are attachments. (Refer to module: *Attachments to Documents* for more information.)

(See Figure 6b.)

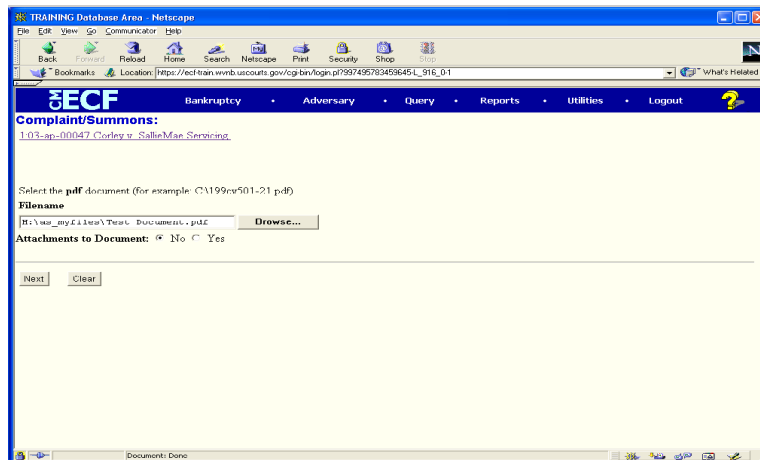


Figure 6b

- ◆ Click **[Next]** to continue.

**STEP 7** The **SELECT THE PARTY SERVED** screen appears. (See Figure 7a.)

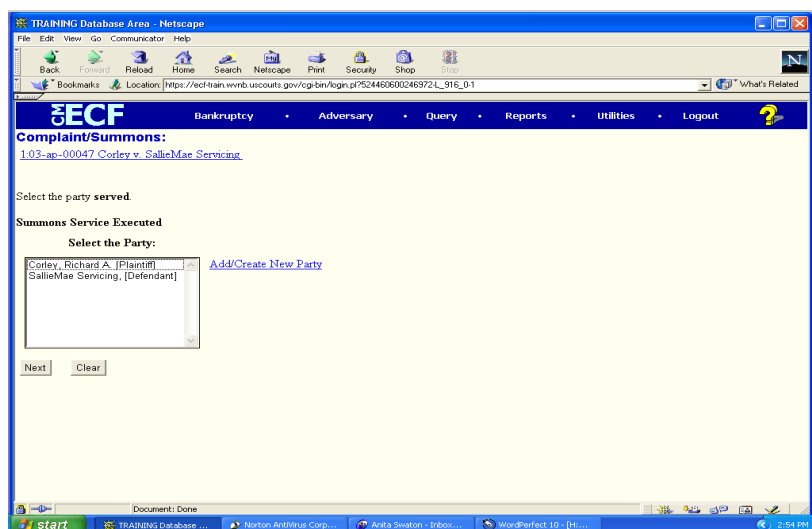


Figure 7a

- ◆ Select the defendant(s) who were served with the summons and complaint. (See Figure 7b.)

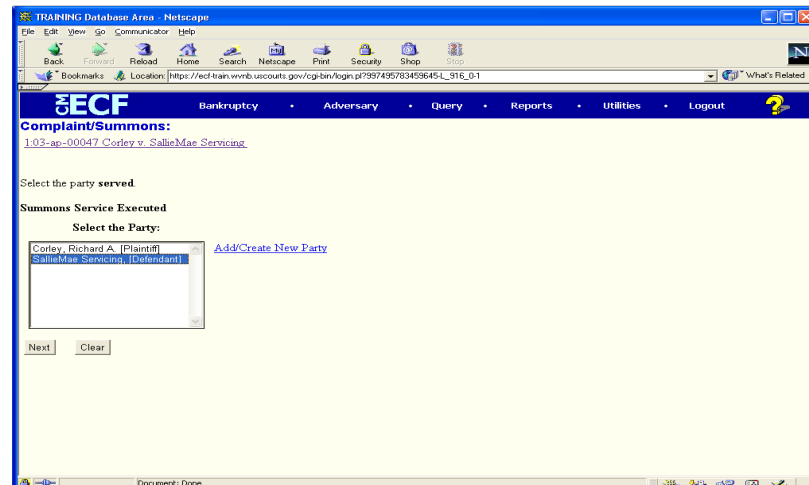


Figure 7b

- ◆ Click **[Next]** to continue

**STEP 8** The **Enter Date Served** screen appears. (See Figure 8.)

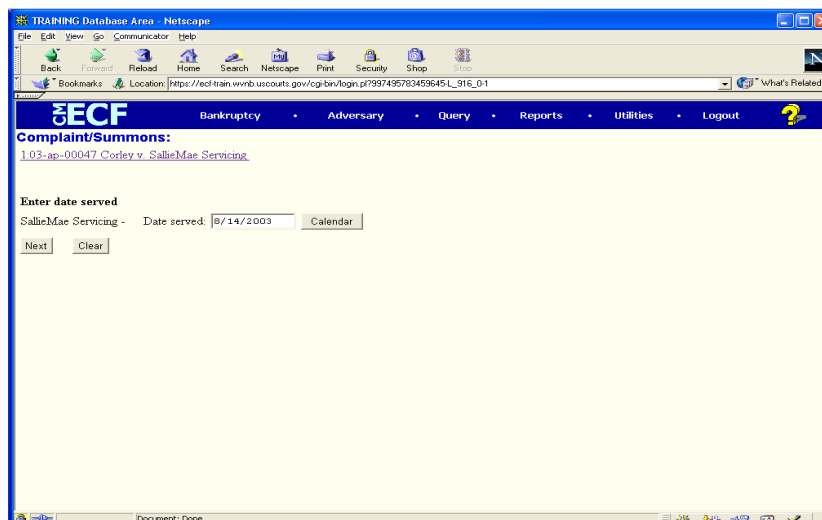


Figure 8

- ◆ Enter the date the defendant(s) were served with the summons and complaint.

**NOTE:** Please note that the date defaults to the present date.

- ◆ Click **[Next]** to continue.

**STEP 9** The **Docket Text: Modify as Appropriate** screen displays. (See Figure 9.)

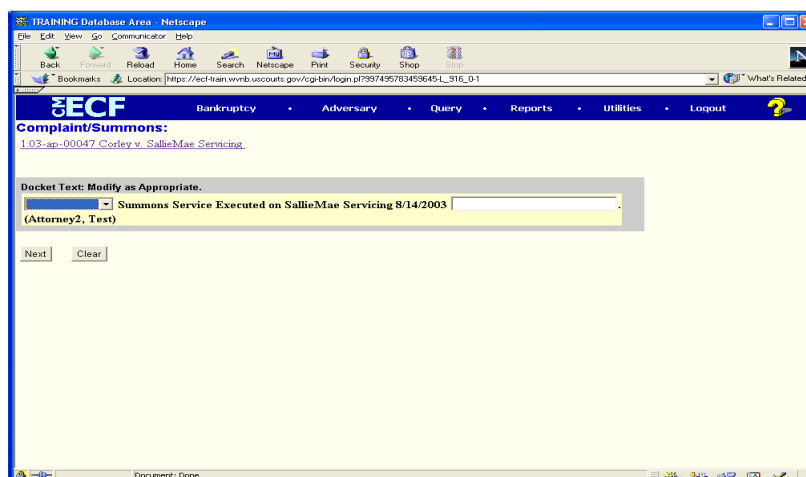
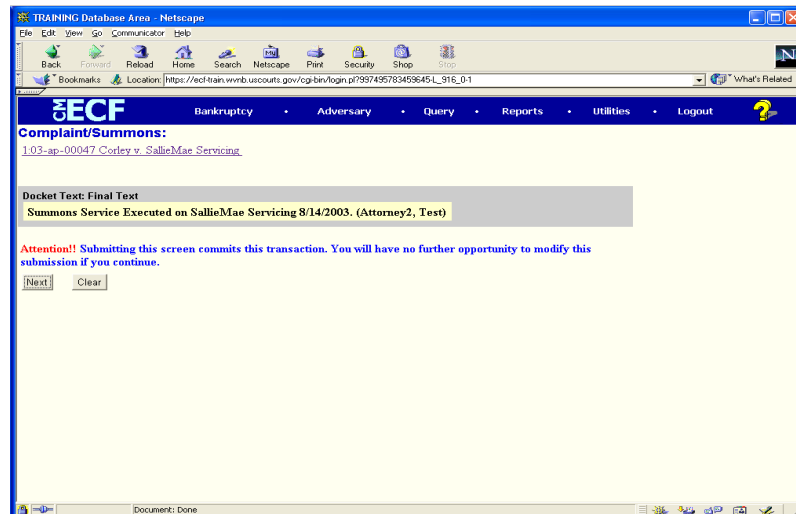


Figure 9

- ◆ Verify the accuracy of the Docket Text.
- ◆ You may enter additional text in the white box if necessary and/or select appropriate text from the blue drop-down menu. It should not be necessary to expand on this docket entry though.
- ◆ Click **[Next]** to continue

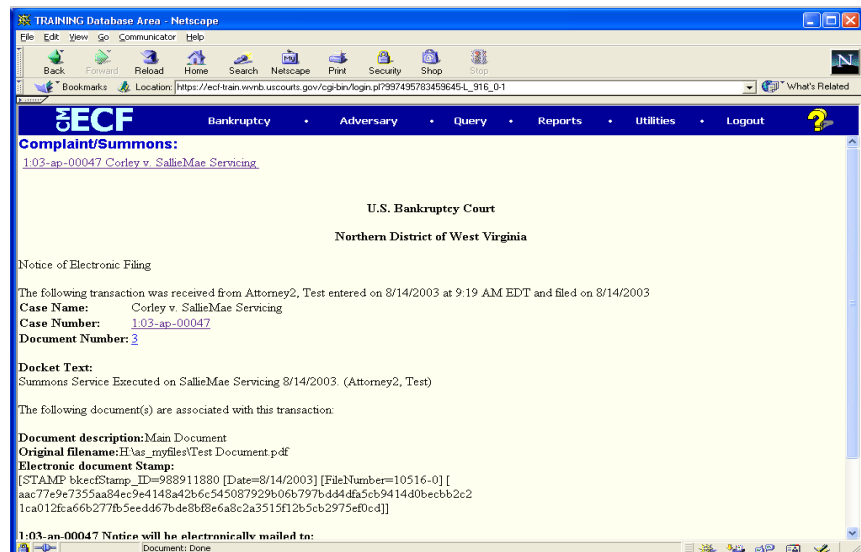
**STEP 10** The **Final Approval** screen displays. (See Figure 10.)



**Figure 10**

- ◆ Verify the Final Docket Text. Read the warning message.
- ◆ If the Final Docket Text is **correct**:
  - ◆ Click **[Next]** to continue and officially submit the document.
- ◆ If the Final Docket Text is **incorrect**:
  - ◆ Click the browser **[Back]** button to find the error(s) and then proceed with the event.
  - ◆ To abort or restart the transaction, return to **Step 1** and begin again.

**STEP 11** The **NOTICE OF ELECTRONIC FILING** screen appears. (See Figure 11.)



**Figure 11**

- ◆ The Notice of Electronic Filing is the verification that the filing has been filed electronically in the court's database. It certifies that the document is now an official court document.
- ◆ Clicking on the case number hypertext link on the **Notice of Electronic Filing** will present the *Docket Report* for this case.
- ◆ Clicking on the document number hypertext link will present the *PDF Image* of the document just filed.
- ◆ To print a copy of this notice click the browser **[Print]** icon.
- ◆ To save a copy of this notice, click **[File]** on the browser menu bar and select **Save Frame As**.
- ◆ You may also save the notice through the browser **File/Save** option.

## Amended Complaint

This process shows the steps and screens required for an attorney to electronically file an amended complaint in an adversary case.

- STEP 1** Click on the Bankruptcy hyperlink on the CM/ECF Main Menu Bar. (See Figure 1.)

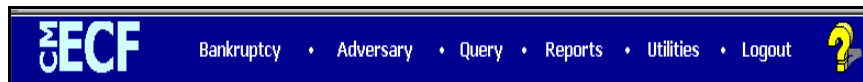


Figure 1

- STEP 2** The **BANKRUPTCY EVENTS** screen displays. (See Figure 2.)

- ◆ Click on the Other hyperlink.

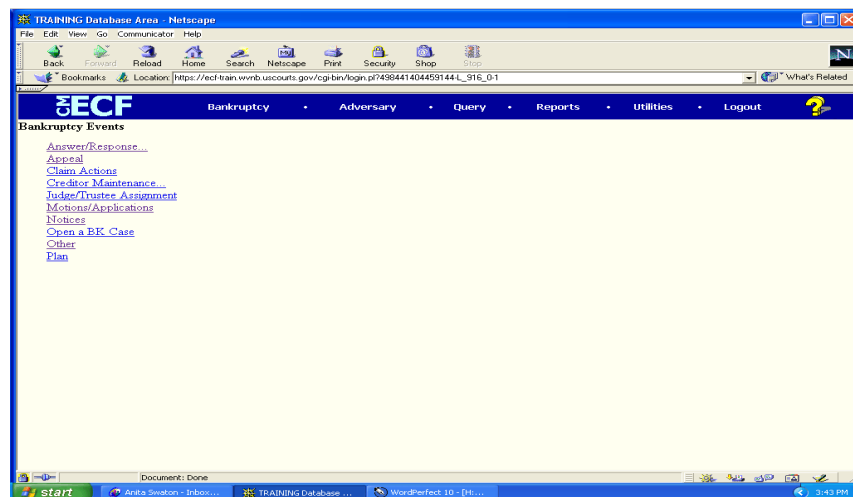
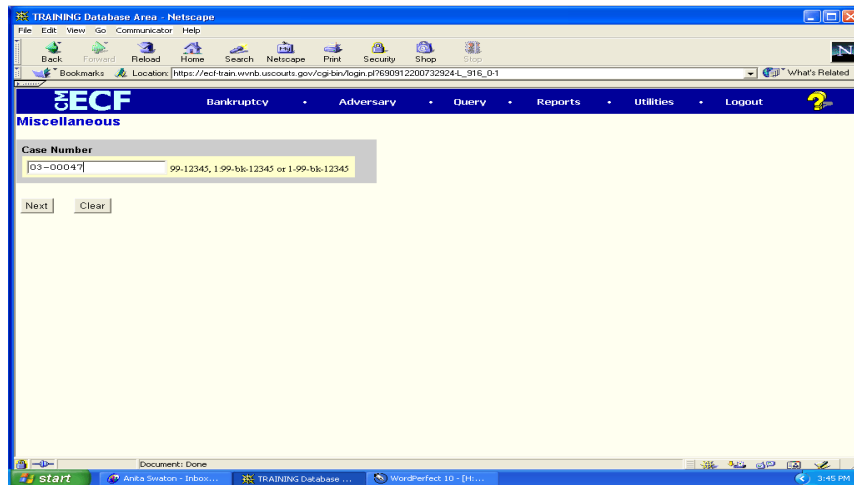


Figure 2

**STEP 3** The **CASE NUMBER** screen displays (See Figure 3). The system will display the number of the last case you accessed in this session.

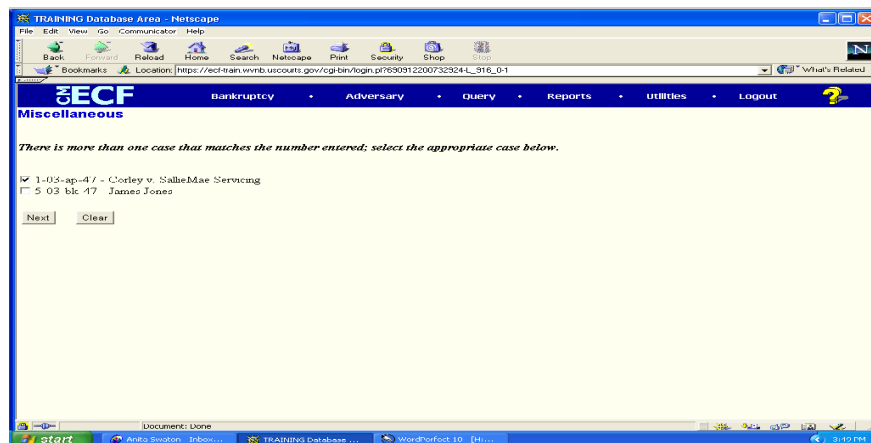
- ◆ If this is **not** the case in which you are filing the amended complaint, delete this case number and enter the correct case number using yy-nnnnn format.
- ◆ Click **[Next]** to continue.



**Figure 3**

**STEP 4** This screen may appear if there is more than one case matching the number entered. (See Figure 4.)

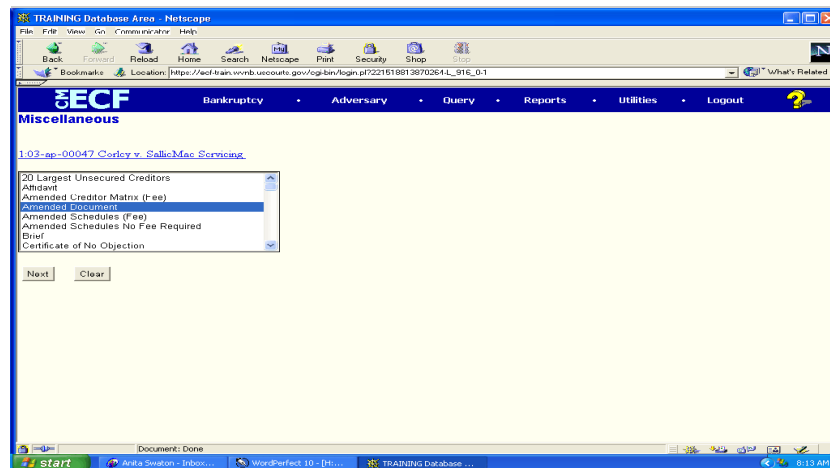
- ◆ Select the appropriate case.
- ◆ Click **[Next]** to continue.



**Figure 4**

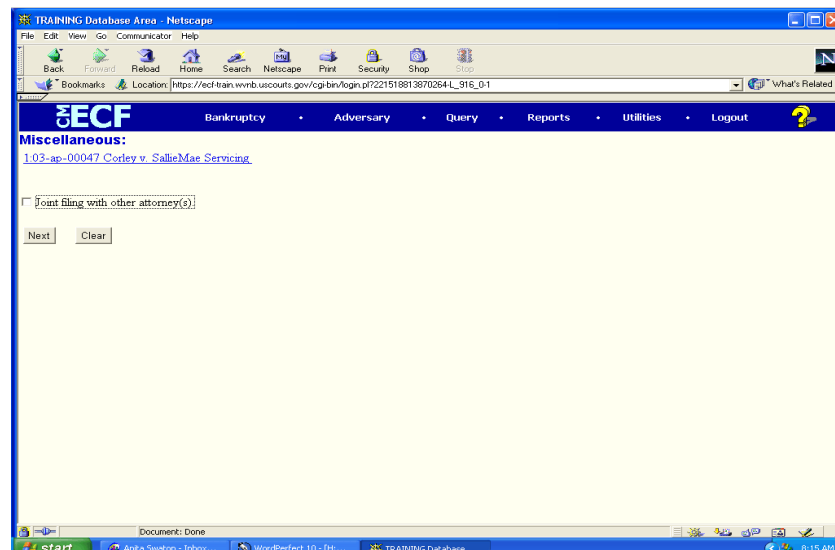
**STEP 5** The **Event Type** screen displays. (See Figure 5.)

- ◆ Select Amended Document.
- ◆ Click **[Next]** to continue.



**Figure 5**

**STEP 6** The **Joint Filing** screen appears. (See Figure 6.)

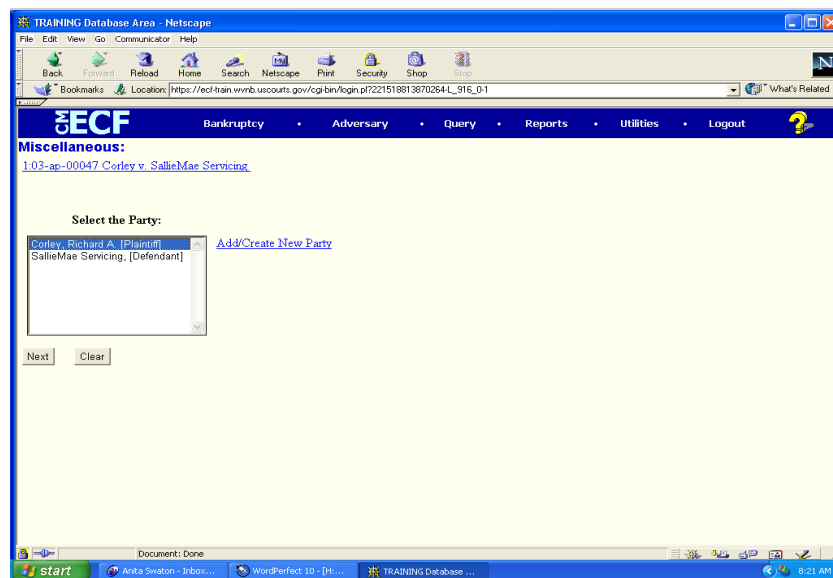


**Figure 6**

- ◆ If you are filing this pleading jointly with another attorney, click in the check box to indicate that. This will enable you to select the other attorney(s) later in this event.
- ◆ If this is **not** a joint filing, no further action is necessary.
- ◆ Click **[Next]** to continue.

**STEP 7** The **SELECT PARTY** screen appears and displays all of the parties currently in the case. (See Figure 7.)

- ◆ Click on the plaintiff(s) filing the amended complaint.
- ◆ Click **[Next]** to continue.



**Figure 7**

**STEP 8** The **PARTY/ATTORNEY ASSOCIATION** screen displays. (See Figure 8.)

- ◆ Although you have selected the party whom you are representing, the system doesn't automatically make that association. Therefore, you must click in the check box to create this link.

- ◆ Click **[Next]** to continue.

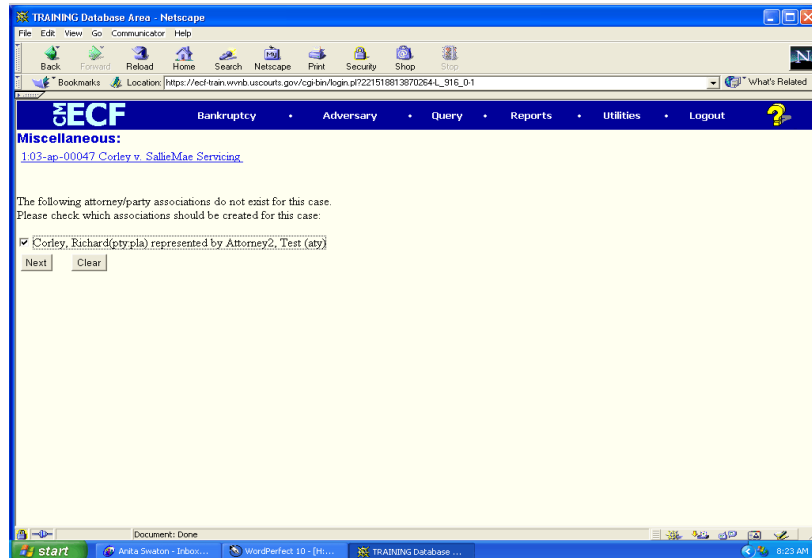


Figure 8

**STEP 9** The **PDF DOCUMENT** screen will then be presented.  
(See Figure 9.)

- ◆ To associate the imaged document with this entry:
  - Click **[Browse]**. In the **File Upload** window change **Files of type:** to **All Files (\*.\*)** Navigate to the directory where the appropriate PDF file is located and select it with your mouse.
  - To make certain you are about to associate the correct PDF file for this entry, right click on the filename with your mouse and select **Open**.
  - This will launch the Adobe Acrobat Reader to display the contents of the imaged document. Verify that the document is correct.
  - Close or minimize the Adobe application and if that is the correct file, click Open on the File Upload dialogue box.

- The system will enter the path and name of the PDF document selected into the Filename field.
- Click **[Next]**.

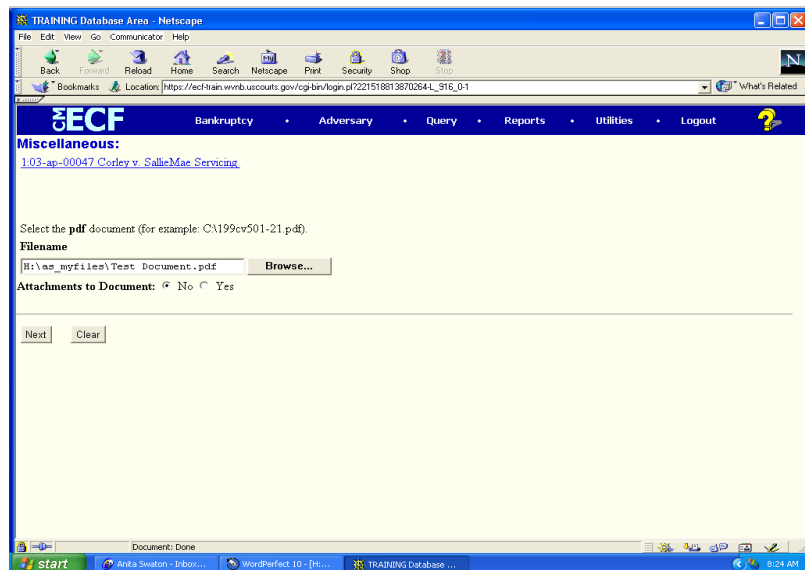


Figure 9

**STEP 10** The **Refer to Existing Event(s)?** screen appears. (See Figure 10.) This screen reminds you to relate the amended complaint to the original complaint.

- ◆ Click in ***Refer to existing event(s)?***
- ◆ Click **[Next]** to continue.

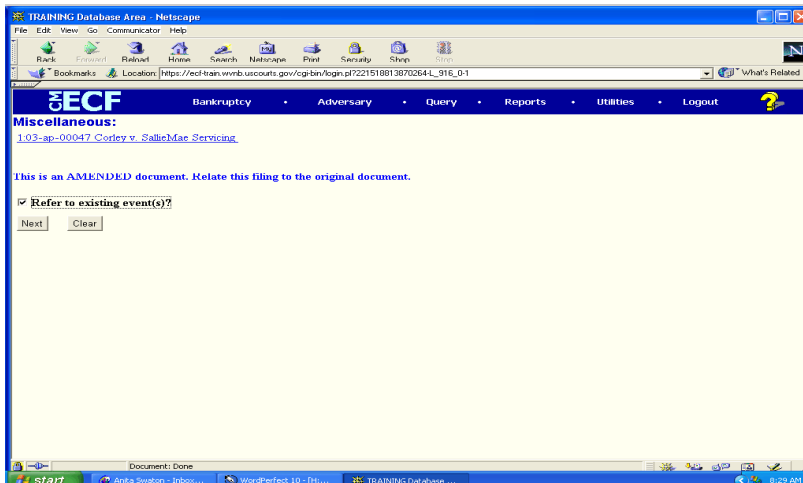


Figure 10

**STEP 11** The **Select the Category to Which Your Event Relates** screen appears. (See Figure 11.)

- ◆ Select **cmp**.
- ◆ Click **[Next]** to continue.

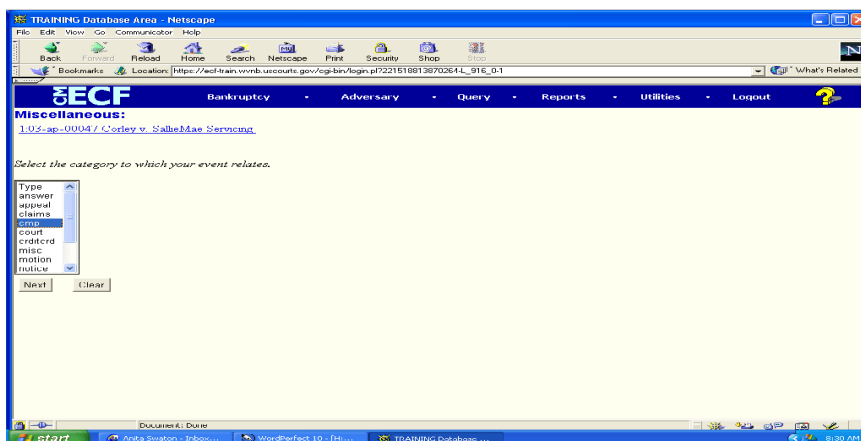


Figure 11

**STEP 12** The **Select the Appropriate Event(s) to Which Your Event Relates** screen appears. (See Figure 12.)

- ◆ Select the complaint to link the amended complaint.

- ◆ Click **[Next]** to continue.
- STEP 13** The **FINAL TEXT EDITING** screen displays. (See Figure 13.)
- ◆ Insert in docket text **Complaint**.
- ◆ Verify the accuracy of the docket text. This is what will print on the docket sheet. If the docket text has an error, click the browser's **[Back]** button at the top of the screen one or more times to access the screen on which the error was made, and correct the error.
- ◆ To abort or restart the transaction, click on the Bankruptcy hyperlink on the **CM/ECF Main Menu Bar**. Although this can be done at any time, this is your last opportunity to change the event.
- ◆ When the docket text is correct, click **[Next]** to continue.

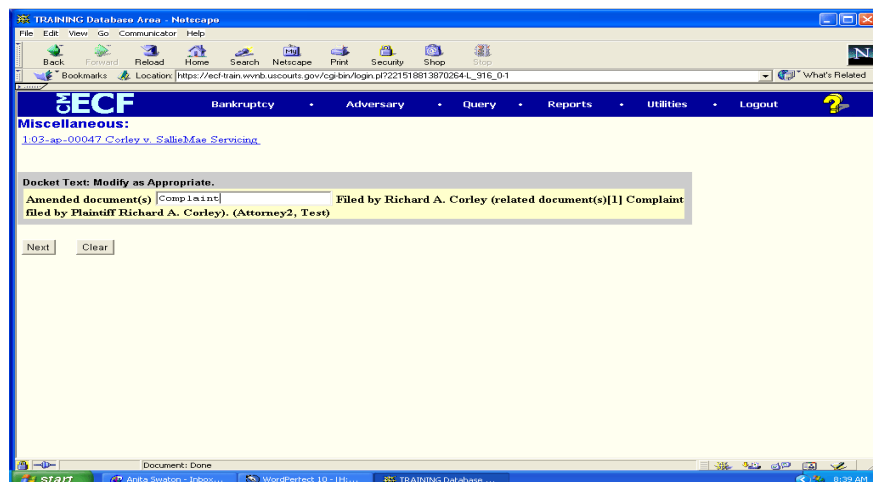


Figure 13

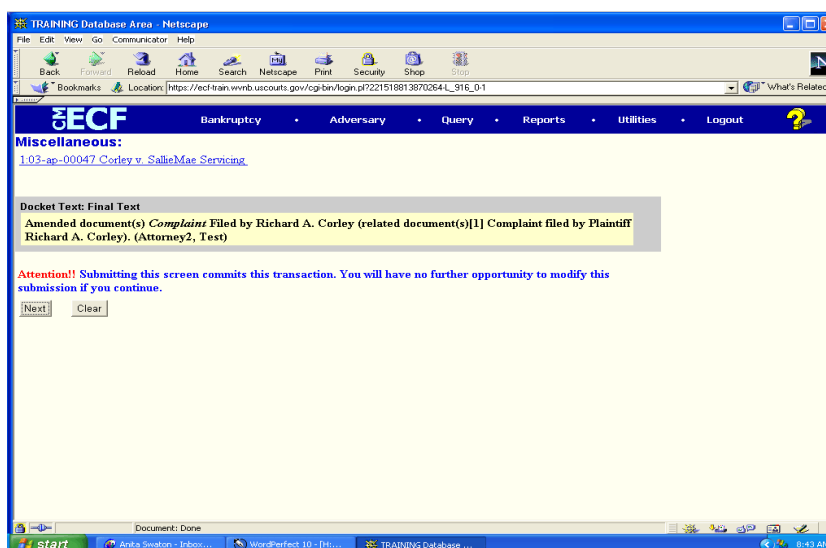
Select the appropriate event(s) to which your event relates:

- ☒ 07/30/2003 1. Complaint by Richard A. Corley against SallieMae Servicing NOS: 426 (Dischargeability 523). Receipt Number O, Fee Amount \$150. (Attorney2, Test)
- ☐ 08/13/2003 2. Summons Service Executed on SallieMae Servicing 8/13/2003. (Attorney2, Test)
- ☐ 08/14/2003 3. Summons Service Executed on SallieMae Servicing 8/14/2003. (Attorney2, Test)
- ☐ 08/29/2003 4. Summons Service Executed on SallieMae Servicing 8/29/2003. (Attorney2, Test)
- Next Clear

Figure 12

**STEP 14** The **FINAL DOCKET TEXT** screen displays. (See Figure 14.)

- ◆ Read the **Attention!!** message.
- ◆ If you are ready to submit this transaction click **[Next]**.



**Figure 14**

**STEP 15** The **NOTICE OF ELECTRONIC FILING** screen displays. (See Figure 15.)

- ◆ The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court's database. It certifies that this is now an official court document.

- ◆ Clicking on the case number hyperlink will display the PACER login screen. After logging into PACER, the docket report screen will appear.
- ◆ Clicking on the document number hyperlink will display the PACER login screen. After logging into PACER, the PDF document will appear.
- ◆ To print a copy of this notice, click the browser **[Print]** icon or button.
- ◆ To save a copy of this receipt, click **File** on the browser menu bar and select **Save Frame As**.

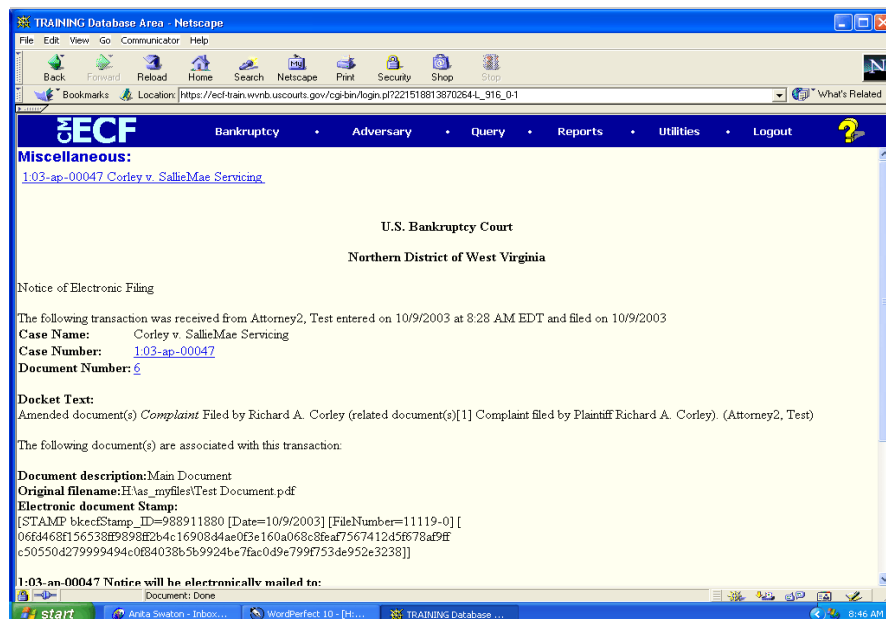


Figure 15

# Attorney Event List

## BANKRUPTCY EVENTS

### Answer/Response...

- Reference an Existing motion/application

  - Answer to Interrogatories

  - Objection

  - Reply

  - Response

### Other Answers

- Involuntary Answer (for Attorney Invol Summ Srvc Exec)

- Involuntary Answer (for Court Invol Summ Srvc Exec)

### Appeal

- Abstract of Judgment

- Addendum to Record on Appeal

- Appellant Designation

- Appellee Designation

- Cross Appeal

- Notice of Appeal

- Notice of Docketing Record on Appeal

- Notice of Referral of Appeal to BAP

- Objection to Referral to BAP

- Request for Transcript re: Appeal

- Statement of Issues on Appeal

- Transcript Re: Appeal

Transmittal Memorandum (BAP)  
Transmittal of Record on Appeal

Claim Actions

Assignment of Claim  
Expungement /Withdrawal of Claim  
Objection to Claim  
Objection to Transfer of Claim  
Transfer of Claim

Creditor Maintenance...

Upload a creditor matrix file

Judge/Trustee Assignment

Motions/Applications

Abandon  
Accounting  
Adequate Protection  
Administrative Expenses  
Allow Claims  
Allow Payment Arrearages  
Amend  
Amended Application  
Amended Motion  
Appear pro hac vice  
Application (Generic)  
Appoint Creditors' Committee  
Appoint Trustee  
Approve Settlement  
Assume/Reject  
Avoid Lien  
Borrow  
Change Venue  
Compel  
Compensation

Compensation of Principals  
Compromise Controversy  
Consolidate  
Consolidate for Hearing  
Contempt  
Continue Hearing  
Continue Meeting of Creditors  
Convert Case from 7/13 to 11  
Convert Case to 12  
Convert Case to 13  
Convert Case to 7  
Deconsolidate Case Association  
Defer Fee  
Deposit Funds into Court Registry  
Deposit Unclaimed Funds  
Determine Secured Status  
Determine Tax Liability  
Disallow Claims  
Dismiss Case  
Dismiss Case for Substantial Abuse  
Dismiss Party  
Dismiss/Withdraw Document  
Distribute  
Employ  
Examination  
Expedite Hearing  
Extend Exclusivity Period  
Extend Plan Payments  
Extend Time to File Complaint  
Extend/Shorten Time  
File Amended Document  
File Petition Out of Venue  
Final Decree  
Hardship Discharge  
Joint Administration  
Leave to Appeal

Limit Notice  
Limited Admissions  
Modify Plan  
Moratorium  
More Definite Statement  
Motion (Generic)  
Motion Two Part (Generic)  
Pay  
Pay Filing Fee in Installments  
Preliminary Injunction  
Prohibit Use Cash Collateral  
Protective Order  
Quash  
Reaffirmation  
Reclassify Claims  
Reconsider  
Recusal  
Redeem  
Reinstate Case  
Relative to Previous Order  
Relief from Co-Debtor Stay  
Relief from Stay  
Remand  
Remove Debtor as Debtor in Possession  
Reopen Chapter 11 Case  
Reopen Chapter 12 Case  
Reopen Chapter 7/13 Case  
Sanctions  
Sell  
Sell Free and Clear  
Set Hearing  
Set Last Day to File Proofs of Claim  
Sever Chapter 11 Case  
Sever Chapter 12 Case  
Sever Chapter 7/13 Case  
Stay

Stay Pending Appeal  
Substitute Attorney  
Suspend Plan Payments  
Transfer Case  
Transfer Case (Intra-District)  
Turnover of Property  
Use Cash Collateral  
Vacate  
Vacate Discharge  
Waive Appearance  
Waive Filing Fee  
Waive Pay Order  
Withdraw as Attorney  
Withdraw Monies from Registry  
Withdrawal of Reference  
Writ

#### Notices

Generic Notice (ATY, TR)  
Notice Appointing Successor Trustee  
Notice Appointing Trustee  
Notice of Abandonment  
Notice of Default  
Notice of Dismissal  
Notice of Filing  
Notice of Hearing (ATY)  
Notice of Mailing of Fee Statement  
Notice of Motion and Order (COURT USERS ONLY)  
Notice of Proposed Distribution  
Notice of Rescission  
Notice of Substitute Attorney  
Notice of Voluntary Conversion to Chapter 7 (ATTY and TR)  
Notice of Voluntary Dismissal  
Notice of Withdrawal  
Notice to Take Deposition

Open a BK Case

Other

- 20 Largest Unsecured Creditors
- Affidavit
- Amended Creditor Matrix (Fee)
- Amended Document
- Amended Schedules (Fee)
- Amended Schedules No Fee Required
- Brief
- Certificate of No Objection
- Certificate of Service
- Chapter 11 Ballots
- Creditor Disk
- Creditor Request for Notices
- Declaration
- Disclosure of Compensation of Attorney for Debtor
- Equity Security Holders
- Exhibit
- Interrogatories
- Involuntary Petition (Chapter 11) for Attorneys
- Involuntary Petition (Chapter 7) for Attorneys
- Involuntary Petition - Add Alleged Debtor
- Involuntary Summons Service Executed
- Involuntary Summons Service Unexecuted
- Itemization of Expenses
- Notice of Appearance and Request for Notice
- Notice of Change of Address
- Objection to Debtor's Claim of Exemptions
- Operating Report
- Praecipe
- Proposed Order
- Reaffirmation Agreement
- Redemption Agreement
- Report
- Request for Admissions

Request for Hearing  
Request for Notice of Fees Due  
Request for Production of Document  
Request for Telephonic Hearing  
Schedule A  
Schedule B  
Schedule C  
Schedule D  
Schedule E  
Schedule F  
Schedule G  
Schedule H  
Schedule I  
Schedule J  
Schedules A-J  
Section 304 Petition  
Statement of Financial Affairs  
Statement of Intent  
Statement of Visiting Attorney  
Stipulation  
Summary of Schedules  
Supplement to Document  
Voluntary Petition (Chapter 11)  
Voluntary Petition (Chapter 12)  
Voluntary Petition (Chapter 13)  
Voluntary Petition (Chapter 7)  
Voluntary Petition (Chapter 9)  
Witness Subpoena

Plan

Amended Disclosure Statement  
Amended Plan (13 or 11)  
Chapter 11 Plan  
Chapter 12 Plan  
Chapter 13 Plan  
Chapter 9 Plan

Disclosure Statement  
Objection to Confirmation of Plan  
Objection to Disclosure Statement

## **ADVERSARY EVENTS**

### Answers...

Motion/Application  
Answer to Interrogatories  
Objection  
Reply  
Response  
Complaint, 3<sup>rd</sup>, cross, counter

### Complaint & Summons

Complaint  
Counterclaim  
Crossclaim  
Fourth-Party Complaint  
Notice of Removal  
Registration of Foreign Judgment  
Summons Service Executed  
Summons Service Unexecuted  
Third-Party Complaint

### Motions

Amend  
Amended Application  
Amended Motion  
Appear pro hac vice  
Application (Generic)  
Compel  
Compensation  
Compromise Controversy  
Consolidate

Consolidate for Trial  
Contempt  
Continue Hearing  
Deconsolidate Case Association  
Default Judgment  
Defer Fee  
Dismiss Adversary Proceeding  
Dismiss Party  
Dismiss/Withdraw Document  
Expedite Hearing  
Extend/Shorten Time  
Intervene  
Jury Trial  
More Definite Statement  
Motion (Generic)  
Motion Two Part (Generic)  
Preliminary Injunction  
Protective Order  
Quash  
Re-Issue Summons  
Reconsider  
Recusal  
Reinstate Case  
Remand  
Reopen Case  
Sanctions  
Set Hearing  
Stay  
Stay Pending Appeal  
Substitute Attorney  
Summary Judgment  
Transfer Adversary  
Transfer Adversary Case (Intra-District)  
Vacate  
Withdraw as Attorney  
Withdrawal Reference

Notices

Notice of Dismissal

Notice of Rescission

Notice of Stipulated Dismissal in an Adversary  
Proceeding

Notice of Substitute Attorney

Notice to Take Deposition

Open an AP Case

Open an MP Case

# Glossary

**Adobe Acrobat**

Application used almost universally to create and view "PDF" documents. "Adobe" created the "PDF" format.

**Attachment**

An additional supporting document filed electronically with a pleading. Proposed orders can be attachments to motions and applications.

**Automatic E-mail Notification**

A CM/ECF feature that permits any user to receive notification of the filing of a case or document via e-mail. Users can choose to receive separate notifications throughout the day or an end-of-day summary.

**Browse**

A Windows operation of navigating through directories via a mouse to select a specific file.

**Browser**

A browser is a software program which provides a user-friendly interface allowing a user to access information and services available on the Internet. The browser programs interpret Hypertext Markup Language (HTML) documents delivered from WEB servers. Netscape Navigator and Internet Explorer are the two most popular WEB browsers. Netscape Navigator version 4.7x and Internet Explorer 5.0 and 5.5 are the only browsers tested for CM/ECF.

**Category**

In CM/ECF, a category is a classification of similar document types. Category selections appear as hypertext links under the Bankruptcy and Adversary menu selections.

**CBT**

A CBT (computer-based training) is an on-line learning application accessed over a local area network (LAN) or from a CD. When a CBT is accessed over the Web, it is referred to as web-based training or a WBT.

**Check Box**

A control object a user can click to include choices from a list. Check boxes are designed so that you can chose one or more items from a list.

**CM/ECF**

Case Management/Electronic Case Files is the Administrative Office's new application that will revolutionize the way we do business, completely replacing BANCAP and NIBS with "next generation" case management capabilities. With CM/ECF attorneys can file cases and documents electronically via the Internet.

**Default**

A Default is a common suggested value displayed by CM/ECF on a screen. Like BANCAP, many fields in CM/ECF have common values suggested. If correct, you may accept them; if incorrect, you type over them.

**Document Type**

In CM/ECF, Document Type describes a specific filing or event with similar characteristics within a case which behaves uniquely from other document types.

**Drop Down Box**

A window listing selections of data alphabetically in a text box. They are used throughout CM/ECF for making selections. When you see the selection you want to make, click to highlight it. To make multiple selections, hold your control key down when making the second (third, etc.) selection.

**Hypertext (HTML) Link**

A hypertext link is a URL imbedded in an html (hypertext markup language) document most often underlined. It permits the user to move from one area (or topic) to another in a Web based program.

**MR**

An MR, or software modification request, is the formal method used in the courts by users to ask for changes in the program. Changes can be either

enhancements or the discovery of a functional program error.

### **Notice of Bankruptcy Case Filing**

A CM/ECF document that is generated at case opening with all the substantive information of the case. The Entry Date appears on the local court seal displayed on this formal notice. When the petition is submitted by an attorney both the date and the time of filing appear. This official document can be used to enforce collection and foreclosure activities of creditors.

### **Notice of Electronic Filing**

An electronic document produced by CM/ECF which certifies filing of all documents and claims with the U.S. Bankruptcy Court. All parties requesting electronic notification can be sent this certification via electronic mail.

### **PDF Document**

A "Portable Document Formatted" document is a type of imaged document created by Adobe Acrobat. Each document is secured with a unique encrypted key. All documents in CM/ECF must be in "PDF" format with the exception of the creditor list (matrix) which must be uploaded in a text (.txt) format

### **Radio Button**

A round selection button used to choose items from a list. Radio buttons are designed so that you can choose only one item.

### **URL**

URL is short for Universal Resource Locator. URLs are the naming scheme used to find Web pages. A URL is similar to a street address.

The URLs for West Virginia Northern Bankruptcy Court systems are:  
Live database: <http://ecf.wvnb.uscourts.gov>

Training Database: <http://ecf-train.wvnb.uscourts.gov>

**UNITED STATES BANKRUPTCY COURT  
FOR THE NORTHERN DISTRICT OF WEST VIRGINIA  
CM/ECF**

**(Case Management/Electronic Case Files)  
ELECTRONIC FILING REGISTRATION FORM**

To register for an account on the Court's CM/ECF System, so that you may electronically file pleadings with the Court, please provide the information requested below:

Name: \_\_\_\_\_

—

Firm

Name: \_\_\_\_\_

Firm

Address: \_\_\_\_\_

Voice Phone

Number: \_\_\_\_\_

Fax

Number: \_\_\_\_\_

Preferred

Login: \_\_\_\_\_

Preferred Password: \_\_\_\_\_

Contact Name(s) and phone number(s) of a Paralegal or Secretary who will be using your login and password: \_\_\_\_\_

\_\_\_\_\_

—

**\*\*Please Note \*\***

**Before we will add you to the system you must submit:**

**1.) The Email Notification Form and 2.) If you are certified in another Court and did not attend our training, submit a copy of your certification from that Court (Not necessary for SDWV trainees).**

By signing below, you agree that you have reviewed the Attorney Manual for the Northern District of West Virginia and agree to follow our procedures.

Signature:\_\_\_\_\_

Date:\_\_\_\_\_

# CM/ECF EMAIL NOTIFICATION SIGN UP FORM

CM/ECF introduces a new feature where attorneys, trustees and parties in cases are able to receive email notification of all pleadings docketed in cases in which they are involved. The email notification may be in summary form at the end of the day or you may receive an email for each event docketed as they are done. (Caution on the individual emails: This feature could bombard your email all day with numerous email messages. Most users ask for the summary.)

Inside of the email notifications, you will have a "link" to the image of the document and you may click on it and receive "one free look". You may then either print or save a copy of the image on your computer. Once you provide the Court with an email address, you will begin receiving the email notifications. Pursuant to Local Rule 5005-4.10, electronic service of the Notice of Electronic Filing by the Clerk to registered filing users constitutes service of the filed document under the Federal Rules of Civil Procedure and the Official Bankruptcy Rules. Please fill out the form below and sign that you understand what this feature brings. Please send this form to the Court: U.S. Bankruptcy Court, P.O. Box 70, Wheeling, WV 26003 or fax it to 304-233-0185. If you have any questions, please call at 304-233-1655.

**Name:** \_\_\_\_\_

—

**Address:** \_\_\_\_\_

—

**Email  
address:** \_\_\_\_\_

**Send notices to these additional Email  
addresses:** \_\_\_\_\_

\_\_\_\_\_

—

**Would you like:**

\_\_\_\_\_ **End of the Day Summaries** or  
\_\_\_\_\_ **Individual email of each filing**

**Format of email:**

\_\_\_\_\_ **HTML for Netscape, ISP mail services: AOL, Hotmail, Yahoo,**

etc.

\_\_\_\_\_Text for ccmil, Groupwise, Outlook, Outlook Express, etc.

**Please**

**sign:**\_\_\_\_\_

**Date:**\_\_\_\_\_